TABLE OF CONTENTS

LOGGING INTO THE SECURE-RES RESERVATION SYSTEM Page 2

Accessing Your Account

Vizergy Client Login

- Selecting the Secure-Res Reservation System

EDIT SETTINGS Page 3

Setting Up Your Property Information

Property Information Page 3

- Basic Information
- Customizations
- Fees
- Rooms
- Travel Agents

Reservation Modules Page 7

- Corporate Negotiated Rates
- Discount Rates/Promos
- Dynamic Packaging
- Group Rates
- Package Rates
- Retail

Promotional Tools Page 25

- Low Inventory Messages
- Rate Display Order
- Step Promotions

Setting Up Your Email Messages Page 32

- Courtesy Email
- Email Harvesting
- Email Templates
- Property Email Information
- Reservation Email

Reservation Terms Page 37

- Disclaimer / Terms
- Cancellation Policies
- Online Cancellations

Additional Options Page 41

- Integration Links
- Language Translations
- ROI/Ad Tracking

RESERVATION REVIEW Page 44

Reservations Management

- New Reservations
- Search Reservations
- Cancelling a Reservation

RATE ADMINISTRATOR Page 47

Setting Up Your Rates and Seasons

- Setting Rates
- View/Print Rates/Inventory/Minimums
- Edit Current Data
- Edit by Room Type Without Seeing Current Data
- Setting Package Rates

REPORTS REVIEW Page 51

Producing Reports

- Summary Reports
- Ad Tracking
- Look /Book Report
- Dynamic Packaging
- Custom Report Generator
- Travel Agents Reports
- Scheduled Reports
- Denials Report

LOGGING INTO THE SECURE-RES RESERVATION SYSTEM

Accessing all of your Vizergy provided services is easy and available to you anywhere that you might have internet access. You have one password to access everything from your reservations systems, form submissions, website page management, email marketing, Social Mentions, and many more useful tools. You will simply login to our **Vizergy Client Login** portal site. You can find a login link at the top right corner of the **Vizergy.com** website. If you do not have a login, you can ask someone at your property that does have a login to add you as a User. If no one at your property has a login, please contact **Vizergy Customer Support** at 904-389-1130 x0 to request a login, or you may request one from your Vizergy Account Executive.

After logging in to ***Vizergy Client Login*** you will select the ***Reservation Systems*** navigation tab, and then you will select the ***Secure-Res Website Reservation System*** link.

If you forget your password for **the Vizergy Client Login,** you can reset it by going to the Vizergy Client Login screen and selecting the "Forgot Your Password" link. A new password will be sent to your email address. If you do not receive it, please check your Spam Folder to ensure that it wasn't marked as a Spam email.

Adding a new user or changing your password can be done in the ***My Account*** section in the top right hand corner of the home page..

Now that you know how to access your **Secure-Res Reservation System**, let's take a look inside and review all of the tools available to you.

After selecting **the *Secure-Res Reservation System*** link, you will see the ***Database Home*** page. This page offers you navigation to other areas of the booking engine. You will also see your ***Revenue at a Glance*** summary report. This is a quick look at the **Month to Date** and **Year to Date** revenue numbers.

Helpful Hints! You will see some Helpful Hints to help you increase your revenue. You also will see System Updates to learn more about any recent or past changes to the booking engine. Our developers are always evaluating your requests for enhancements, and are adding features and improvements that our clients ask for.

Don't forget to sign up for an upcoming training session if you have not yet attended a Secure Res Booking Engine Introductory Training.

EDIT SETTINGS

Property ■ Reservation Modules ■ Promotional Tools ■ Email Messages ■ Reservation Terms ■ Additional Options

Selecting the ***Edit Settings*** link will bring you into the **Edit Settings** page. This page contains navigation to all of the setup areas of your booking engine, with the exception of adding your rates. There is a lot of information to add here, but you will notice that each feature is grouped into sections.

Property
Reservation Modules
Promotional Tools
Email messages
Reservation Terms
Additional Options

You can navigate to any page in the Edit Settings sections through the navigation panel on the left, or as listed on the center of the page.

PROPERTY

Basic Information ■ Customization ■ Fees ■ Rooms ■ Travel Agents

Basic Information

- **Basic Information** is a page that allows you to edit property information which includes Property Name, Address, Phone Number and website URL. The section at the bottom of the page under the Other Information header is very important to set your lead time (how many days in advance that you require guests to book), as well as your tax rates, and other options.

- In the **Other Information** section you will select your time zone. The next option is the **Advanced Reservation Time – sometimes called Lead Time**. Here you will specify whether you accept Same Day reservations, or if you require that guests book a certain number of days in advance. Please keep in mind that selecting days in advance may cause you to miss some last minute reservations, so this is a choice that you will want to put some thought into before deciding what you want to require.

- **Cutoff time for same day bookings** is only needed if you select Same Day as a lead time. The time you select here will be the cutoff time for accepting same day reservations. Please be careful when selecting noon time. This should display as 12PM and not 12AM. If you select 12AM you will actually be forcing the system to not allow same day reservations, because 12AM is midnight, so essentially as soon as it becomes a new day, your cutoff comes into effect.

- **Tax Rates** allows you to set your Total Room Taxes and your Sales Tax. In the Room Tax field put the total of all taxes that are to be applied to each reservations as a percentage. **This will include your Sales Tax**. In the Sales Tax field put only your Sales Tax. When the booking engine calculates the taxes it will pull from the Room Tax field. If additional items are added at the point of sale (if you use Dynamic Packaging, or taxable fees) the Sales Tax field will be used for the calculation. If you wish for taxes to be applied to your package rates, check the Include taxes for packages option.

- **Promotion code** is an optional item to turn on or off by selecting No or Yes from the dropdown. This option when enabled will add an additional field to your guest reservation form. The following field to **customize the promotion field**, allows you to select the text or label next to the field, so you actually can use the field for any purpose by changing the label.

- **Child Age** is the age limit that you consider a person to be a child. So if your Child Age is 16, any child 16 years or younger would be charged at the child rate or stay free if that is your policy. A person that is 17 or older would be considered to be an adult and be charged according to your adult occupancy rules.

- The last option on this page is the **Currency Code**. You will need to select the currency that you accept. This selection will display your rates in the correct currency for your country.

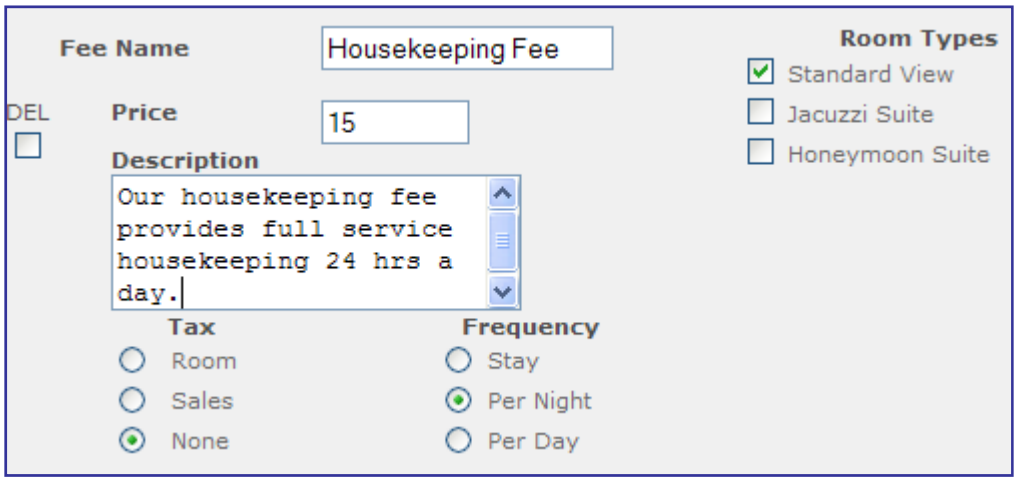
Customizations

The Customizations page allows you to configure options for the following items;

- **Require Terms/Conditions Acceptance** – This area allows you to require that your guests accept the terms and conditions you specify in order to make a reservation.
- **Newsletter Opt in** – You may select an option to display an email newsletter opt in, and whether or not the newsletter opt in is checked by default
- **Package System Header** – You can specify header text to appear on your Packages page.
- **Unit Type** – Select what type of units you have at your property. Example: Rooms, Cabins, Villas, Suites, Condos, or Houses.
- **Default Language** – Select the default language that will be used for the booking engine.
- **Language Translation Status** – This must be turned on if you wish to setup translations for your booking engine.
- **Enable Corporate/Promotion Code Text Box on Check Availability Form** – Check this box if you wish to have a field added to your booking engine search box page for entering promotion or corporate password codes.
- **No Results/Rate Available Text** – You can configure the message displayed when no results are found for a search on the booking engine.
- **Reservation Form Custom Fields** – You may add up to 5 additional fields to be added to your reservation form. You can also mark which fields will be required to complete the reservation.

Fees

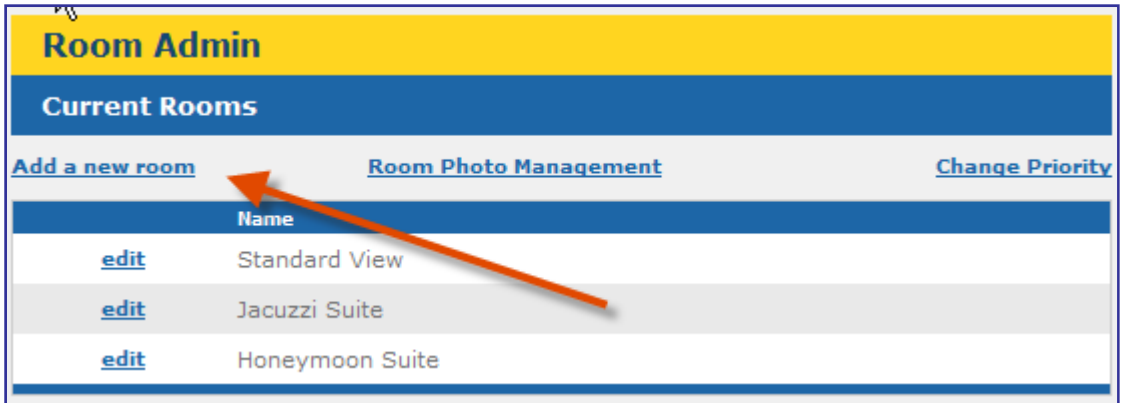
If your property has additional fees in addition to your taxes that may apply to any or all of your room types, you may configure the fee as a currency amount. You will need to add a price, select the room or rooms that it applies to, and whether or not any taxes apply. You will also set the frequency that the fee will be charged.



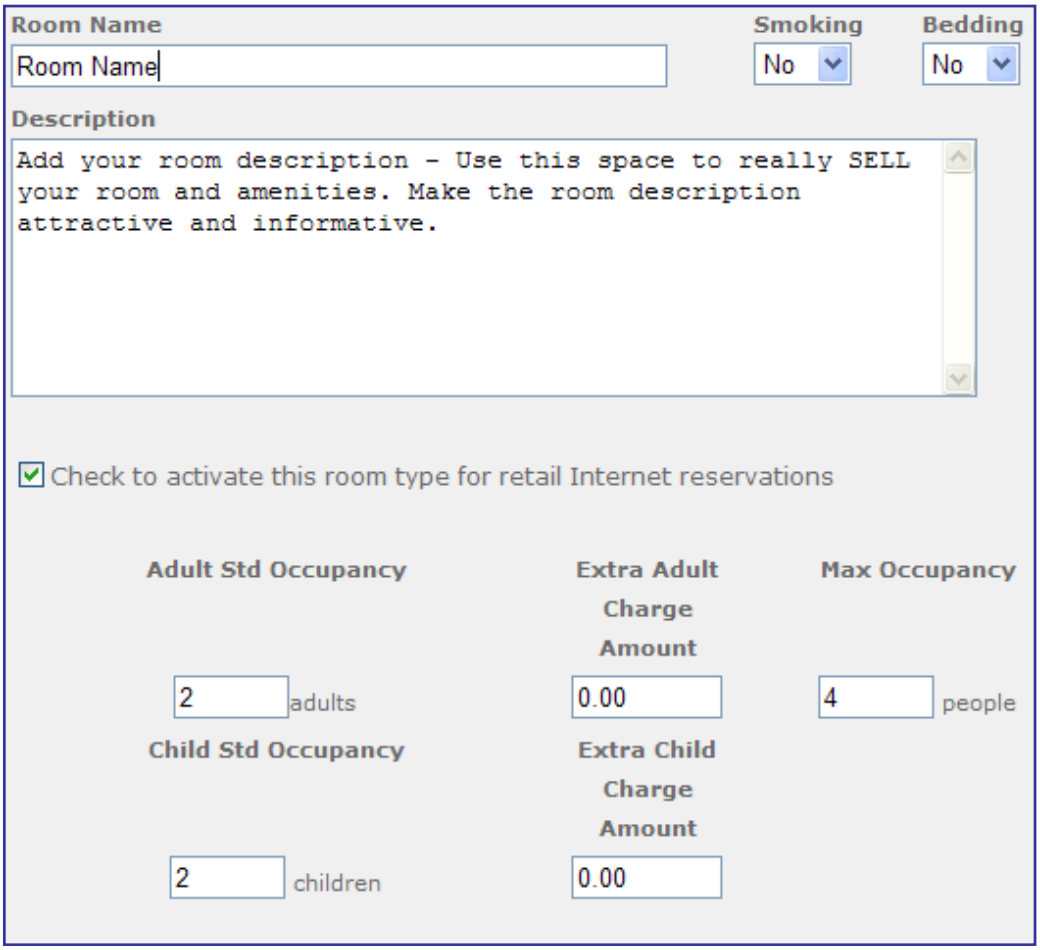
NOTE: Fees cannot be a percentage. Any fees that are a percentage of the room price should be added to the Total Tax field on the Basic Information page.

Rooms

Selecting the Rooms link in ***Edit Settings*** will bring you to the ***Room Admin*** page. On this page you can select a room to edit, manage your photos, or change the priority (order) of the rooms list. You can also add a new room by selecting the Add a new room link.



ADDING A ROOM – clicking the Add a new room link will open a new screen to add your room description, occupancy rules and Smoking and Bedding options.



Smoking and Bedding Options are provided for you to specify the following

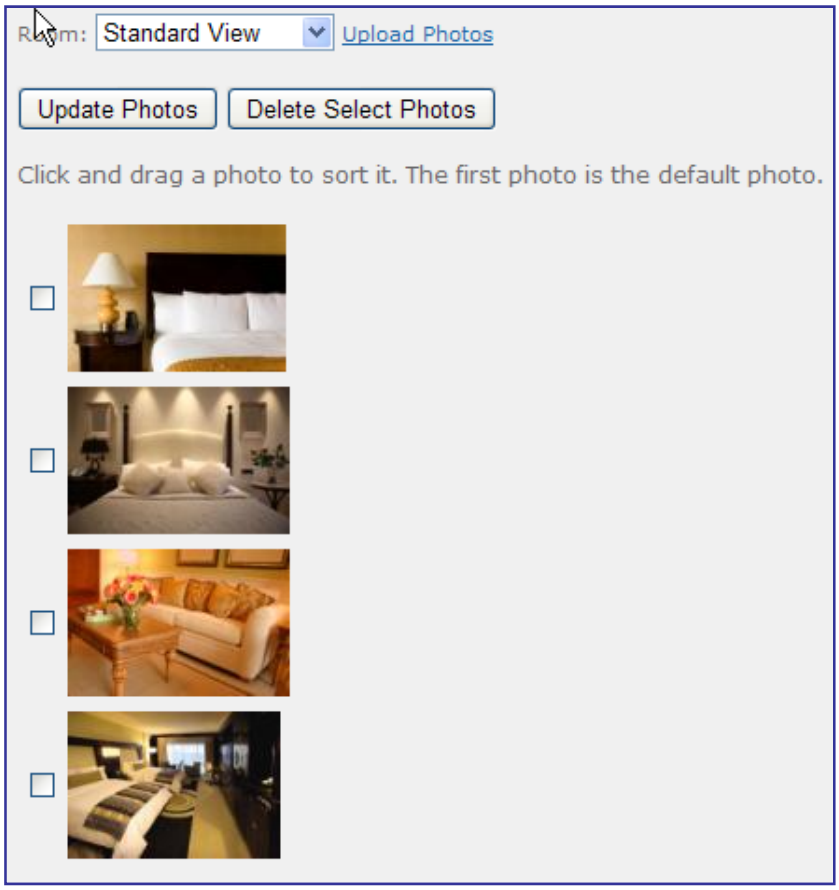
Smoking – select **Yes** to specify that this is a Smoking room.

Bedding – select **Yes** if this room offers a choice between a King bed or two single beds. If this room does not offer that option, select **No** to turn it off.

Your **Adult Standard Occupancy** should be the total adults allowed without incurring extra adult charges. Your **Child Standard Occupancy** should be the total number of children allowed without incurring extra child charges. Your **Max Occupancy** should be the total number of people (Adult and Children) allowed in the room. The **Extra Adult Charge** and **Extra Child Charge** would be the amount charged for any number exceeding the Standard Occupancy number.

Editing an Existing Room is easily done by clicking the Edit button on the Room Admin page. You will see the room displayed just as it did when you were creating it, and all fields will be available for editing.

Room Photo Management – From the Room Admin page, select Room Photo Management.


Room: Standard View
Upload Photos
Update Photos
Delete Select Photos
Click and drag a photo to sort it. The first photo is the default photo.

Select the Room that you wish to upload photos for from the drop down. Click the Upload Photos link to add photos from your computer.

The Uploading page will give you specifics on the preferred width and file size.

You can drag and drop the photos to re-sort the order of appearance.

To delete a photo, check the box on the left and click the Delete Select Photos.

To save changes click the Update Photos button.

To add or update photos for another room, select the correct room from the dropdown field to switch to another room.

ROOM SORT PRIORITY

From the Room Admin page you will see a link for **Change Priority**. This area allows you to change the order that the rooms appear in searches. So if you wish to highlight a particular room you can change it to be listed at the top, or make other changes to your list order.

Travel Agents

You may opt to allow or disallow Travel Agents from using your booking engine to place reservations for their clients. If you opt to allow it, you will want to add a message for Travel Agents so that they know what to expect from you in regard to commission, or any other information that you wish to add. The **Travel Agent Administration** page will offer you the ability to allow travel agents or not, and to add a Value Message to agents who use your system.

If you allow travel agents to use the booking engine to place reservations, you may run a report in the **Reports Review** section to view all travel agent reservations. This will allow you to pay commissions as needed.

RESERVATION MODULES

Corp Negotiated Rate ■ Disc. Rates / Promo ■ Dynamic Packaging ■ Groups ■ Packages ■ Retail

Your **Reservation Modules** allow additional features that expand the rate types that you can offer your guests. The **Corporate Negotiate Rate, Dynamic Packaging, Groups,** and **Packages** modules are optional and can be added to your booking engine. Please contact Vizergy Customer Support to inquire about adding these powerful modules.

Corporate Negotiated Rate

The Corporate Negotiated Rate module allows you to infinitely expand your booking engine options to include the following;

- **Password Protected Rates** – this allows you to offer rates with a promo code, or offer rates to a private group of guests who you have negotiated a special rate with that is accessed via a unique password.
- **Rate Tiers** – You may create stand alone rate tiers that can have separate rates and / or inventory that are not connected to your other rates. This would allow you to always offer rates to anyone with the password even if your other rates are closed out or discounted. You may also mix and match rates and inventory from other rate tiers – for example, you might offer a discounted rate that offers a special rate to a specific corporate group, but will pull the inventory from your retail, so that if you close out your retail rates, this rate would also be closed out. The options are endless and allow you to configure your rates however you need them to be offered. With no limit on rate tiers you can create simple to complex offerings.
- **Expanded Discount Promo Rates** – Your Secure-Res booking engine comes with a limit of two promotional rate plans. When you add the Corporate Negotiated Rate Module, the limit is removed and you can have an unlimited number of Discount Promotional Rates.

SETTING UP A CORPORATE RATE PLAN

When creating a Corporate Rate, or other password protected rate, you will need to decide how you want to configure your rate offering. If you only want to pull rates and inventory from your existing retail rate, or any other previously created rate tier, you will only need to setup the rate plan.

CREATING A NEW RATE TIER

If you wish to create a new rate tier you will need to contact Vizergy Customer Support to add a new rate tier to your booking engine for you. You may call the number at the bottom of this page, or you may simply send an email to customersupport@vizergy.com to request the new rate tier. If sending an email please provide the following information.

- Name of the Property
- Booking Engine number (if you know it)
- Whether the Rate Tier you are requesting will need to be password protected (corporate tier), or whether it will be used publicly with no password (promotional tier).
- The name you would like to call the new rate tier. This would be for your eyes only – and not be visible to your guests.

Your rate tier will be created and a confirmation email will be sent to let you know that your new rate tier is ready for use. If you call us, we generally will do it for you while we have you on the phone. Please have the above information ready for us to create the tier.

BUILDING A RATE PLAN

In **Edit Settings** you will select **Corp Negotiated Rate** from the **Reservation Modules** section of the navigation. On the **Rate Plan Management page** you will see a small link to **Add a corporate/negotiated rate plan**. Select this link to begin setting up your rate plan.

Now you will see the setup page for your new **Corporate/Negotiated Rate Plan**. Fill in all of the fields presented which will include the following;

Corp Negotiated Rate ■ Disc. Rates / Promo ■ Dynamic Packaging ■ Groups ■ Packages ■ Retail

- **Name** – this is the name of the Rate Plan. This is the name that your guest will see when logging in with the password that you supply to them. It should describe the promotion or the name of the company if this is a corporate rate.
- **Password** – this will be the password that your guest will enter to access this rate plan.
- **Require Credit Card** – If this is checked your guest will be offered fields to add credit card information during the reservation process. In the instance where other arrangements for payment have been made and guests will not be paying directly, the box should be unchecked so that credit card information will not be gathered.
- **Discount Type** – If the rate tier that will be used is going to offer the exact rate you wish to use your discount amount would be 0 (zero) and discount type would not matter. If this rate plan will be configured to discount off of an existing rate tier, then your discount type would be either a dollar off or percentage off. Select the appropriate type.
- **Discount Amount** – You will enter the amount (either percentage or dollar off, depending on what you selected for the discount type). To ADD an increase instead of a discount, enter a minus (-) before the amount. The booking engine will add that amount to the rate you select.
- **Booking Window** – This area allows you to select the dates that you want to allow your guests to begin and end making reservations. Even if the availability will be in the future, you can allow those future reservations to be made in advance by configuring the booking window to start allowing the reservations to be booked.
- **Availability Window** – These are the dates that the rates will be offered. Guests will be able to make reservations for anytime during the start and end date in the time frame you set.
- **Advanced Booking** – You may set a unique advance booking (lead time) for this rate plan. If you do not set a specific advance booking time frame in this field, the booking engine will use whatever advance booking setting you have created in your Basic Information page.
- **Minimum Length of Stay** – You may set a number of nights that is required in order to book this rate. If you do not set a minimum length of stay then your default settings will be used.
- **Default Cancellation Policy** – You must select a default cancellation policy to be used with this rate plan. From the drop down field, select an existing policy to assign to this rate plan. If you wish to use a new cancellation policy for this rate, you will need to set up the cancellation policy before creating this rate plan. **You will not be able to save your rate plan without selecting a cancellation policy.**
- **Short Rate Description** – You will need to create a short rate description for your rate. You may use up to 50 characters for your description. This description will show next to the rate name on the booking engine when guests view your rate. **This is a required field**.
- **Rate Terms** – This is a required field that allows you to specify custom rate terms for this rate.
- **Show Low Inventory Remaining Message** - You can select a number that is a threshold that will cause the number of remaining rooms available at this rate to display once that threshold is met. This feature helps your guests determine whether they need to put in the reservation soon if there are a limited number of rooms left that are available. If you wish to disable this feature, simply select **NO** to turn it off.

Select the **Add** button at the bottom of the form. After completing the above information, you will then select the rate tier and inventory tier that you wish to use for this rate plan. You will be asked to choose a **rate tier** to use, select the rate tier you wish to use, and click the **Proceed** button.

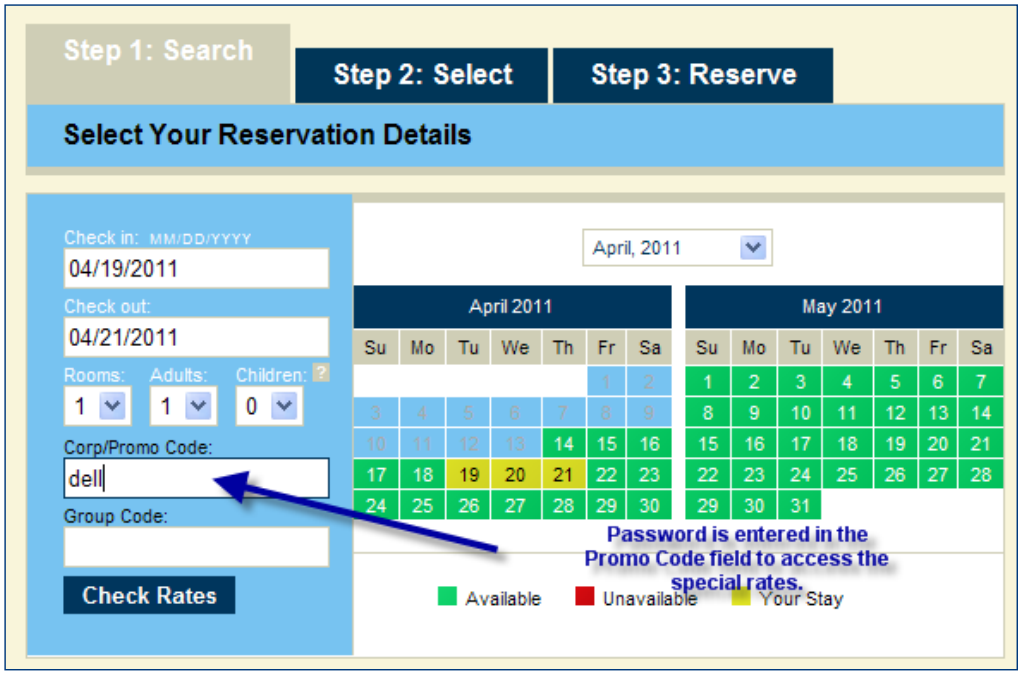
Next you will be asked which tier to use for your **inventory**, and click the **Proceed** button again. If you do not have additional rate tiers added to your booking engine and only have your retail rate available this process will be skipped and you will be moved directly to the next step.

On the next page you will **select the rooms** you wish to use for this rate. Selecting the **Proceed button** finishes your selection process. Your rate plan is now completed, and you can now add rates to your rate tier on the **Rate Administrator** page and your inventory tier, if needed. See the **Rate Administration section** for information on adding rates and inventory.

VIEWING THE CORPORATE/NEGOTIATED RATE ON YOUR WEBSITE

Your Corporate Negotiated Rate plan will be accessed via a password on the main search page of your booking engine, or through your custom search box on your website.

When logging in, your guests who have a password will see the rates you have enabled for them. The password is entered in the Corp/Promo Code field in order to access the rates. If you configured a minimum night stay either in the rate plan, or in Rate Administrator, your guest will need to meet the minimum stay requirement to view the rates.



This screenshot shows how a rate might be displayed to your guests who enter the pass code. You can display the rate by itself, with no other rates visible, or you may allow other rates to display along with them. You can also control the order in which rates types appear. All of these options are controlled through your **Rate Display Order** option, which is found under **Promotional Tools** in **Edit Settings**.

Discounted Rates / Promotional Rates

Discount and Promotional rates are almost identical to the Corporate Negotiated Rate plan. However, without the addition of the Corporate Negotiated Rate plan, the booking engine will only allow two (2) Discounted Rate Promotions.

Discount Rates or Promotional Rates do not require a password to access, however when setting up a promotional rate you will add a promotion code even if you do not intend to require that your guests use a pass code. The promotion code will give you the flexibility to configure a hidden promotion that is available only to guests who have the pass code. To hide the promotion, you would hide the promotion in the hidden column in **Rate Display Order**. Entering the pass code would allow access to the hidden promotion.

SETTING UP A DISCOUNTED PROMOTIONAL RATE

When creating a Promotional Rate you will need to decide how you want to configure your rate offering. If you have the Corporate Negotiated Rate module, you have the option to pull rates and inventory from your existing retail rate, or any other previously created rate tier – or by requesting a new rate tier.

If you do not have the Corporate Negotiated Rate module, you will have the ability to discount rates off of your Retail rate.

In **Edit Settings** you will select **Disc. Rates / Promo** from the **Reservation Modules** section of the navigation.

On the Promotional Rate Plan Discounts page you will see any Promotional rates you have previously added. You will also see a link to **Add a new promotion / discounted rate plan.** Clicking this link will bring you to the setup page.

Now you will see the **Add New Promotion / Discounted Rate Plan** page. Fill in all of the fields presented which will include the following;

- **Name** – this is the name of the Promotion. This is the name that your guest will see when viewing this rate.
- **Promotion Code** –the promotion is code required on this form; however will only be necessary to use if you opt to hide the promotion from public view in **Rate Display Order**.
- **Require Credit Card** – If this is checked your guest will be offered fields to add credit card information during the reservation process. The box should be unchecked if a credit card is not required before booking this rate.
- **Discount Type** – If the rate tier that will be used is going to offer the exact rate you wish to use, your discount amount would be 0 (zero) and discount type would not matter. If this rate plan will be configured to discount off of an existing rate tier, then your discount type would be either a dollar off or percentage off. Select the appropriate type.
- **Discount Amount** – You will enter the amount (either percentage or dollar off, depending on what you selected for the discount type). To ADD and increase instead of a discount, enter a minus (-) before the amount. The booking engine will add that amount to the rate you select.

- **Booking Window** – This area allows you to select the dates that you want to allow your guests to begin and end making reservations. Even if the availability will be in the future, you can allow those future reservations to be made in advance by configuring the booking window to start allowing the reservations to be booked.
- **Availability Window** – These are the dates that the rates will be offered. Guests will be able to make reservations for anytime during the start and end date in the time frame you set.
- **Advanced Booking** – You may set a unique advance booking (lead time) for this rate plan. If you do not set a specific advance booking time frame in this field, the booking engine will use whatever advance booking setting you have created in your Basic Information page.
- **Minimum Length of Stay** – You may set a number of nights that is required in order to book this rate. If you do not set a minimum length of stay then your default settings will be used.
- **Default Cancellation Policy** – You must select a cancellation policy to be used with this rate plan. From the drop down field, select an existing policy to assign to this rate plan. If you wish to use a new cancellation policy for this rate, you will need to set up the cancellation policy before creating this rate plan. **You will not be able to save your promotion without selecting a cancellation policy.**
- **Short Rate Description** – You will need to create a short rate description for your rate. You may use up to 50 characters for your description. This description will show next to the promotion name on the booking engine when guests view your promotion. **This is a required field**.
- **Rate Description** – When a guest clicks on the rate name in the booking engine, a pop up window will display the description you enter here. This is your opportunity to fully describe this promotion and make it sound attractive to your guest. **This is a required field.**
- **Rate Search Display** – This is a quick and easy way to select which rates (if any) that you wish for this promotion to display on the same page with. This will save the extra step of configuring this option in your **Rate Display Order** settings.
- **Show Low Inventory Remaining Message** - You can select a number that is a threshold that will cause the number of remaining rooms available at this rate to display once that threshold is met. This feature helps your guests determine whether they need to put in the reservation soon if there are a limited number of rooms left that are available. If you wish to disable this feature, simply select **NO** to turn it off.
- Select the **Add** button at the bottom of the form. After completing the above information, you will then select the rate tier and inventory tier that you wish to use for this promotion.

Helpful Hints!

If you do not use the Corporate Rate Module, the promotions you create will only use your Retail rate to discount from and these steps will be skipped.

- You will be asked to choose a **rate tier** to use, select the rate tier you wish to use, and click the **Proceed** button.
- Next you will be asked which tier to use for your **inventory**, and click the **Proceed** button again. If you do not have additional rate tiers added to your booking engine and only have your retail rate available this process will be skipped and you will be moved directly to the next step.

DISCOUNT PROMOTIONS – STEP 2

Select Rooms to Use - On the next page you will select the rooms you wish to use for this rate. Selecting the **Proceed button** finishes your selection process. Your promotion is now completed, and you can now add rates to your rate tier on the **Rate Administrator** page and your inventory tier, if needed. **If this promotion is based on your existing Retail rates, you will not need to add rates or inventory.** See the **Rate Administration section** for information on adding rates and inventory.

Step Promotions – you may want to add Step Promotions to add additional features and functionality to your promotional rate. See the section on **Step Promotions** for more information.

Dynamic Packaging

The Dynamic Packaging module allows guests who are placing a Secure-Res reservation to select additional a la carte items during the reservation process. The items are selected from a list offered after selecting a room and prior to the final charge detail page.

You can create a list of items that are offered all of the time, which do not need a specific inventory to be managed, called **Static Items**, or items that are available on a limited basis, called an **Inventoried Item**, or an item that is available only on certain days, called a **Fully Inventoried Item**.

Static items will be offered to every guest who books, no matter when they book, as they are always available.

Inventoried items must be given an inventory and price on the Item Inventory calendar to enable an item to be offered. If an item has a price and available inventory on the day the guest arrives, the item will be offered for selection.

Fully Inventoried items are offered at any point during the guests stay. For example if a holiday meal, basket of cookies, or theater tickets are available on only certain days of the week or month, and the guest's stay includes those days, the item will be offered. In another example, if an item is offered on Wednesdays only, and the Guest arrives on Thursday and leaves on Saturday the item will not be offered because the stay does not include a Wednesday. This allows the hotel to manage items offered in accordance with their availability. As in the **inventoried items**, price and inventory must be added to the inventory/rates calendar to enable the item for booking.

ADDING DYNAMIC PACKAGING ITEMS TO YOUR RESERVATIONS

Dynamic Packaging is found in **Edit Settings**, under the **Reservations Modules** section of the Navigation bar.

1. Select **Dynamic Packaging** from the Edit Settings page
2. Click **Add a new product/Service**
3. Give the product a name, price, tax (if applicable), short description, and extended description, which may include an image.
4. Select the radio button to specify whether the item is Static, Inventoried or Fully Inventoried.
5. Set the minimum amount bookable and maximum bookable.
6. Enable the item by checking the Enable box.
7. Save your product by pressing the **Add new product** button.

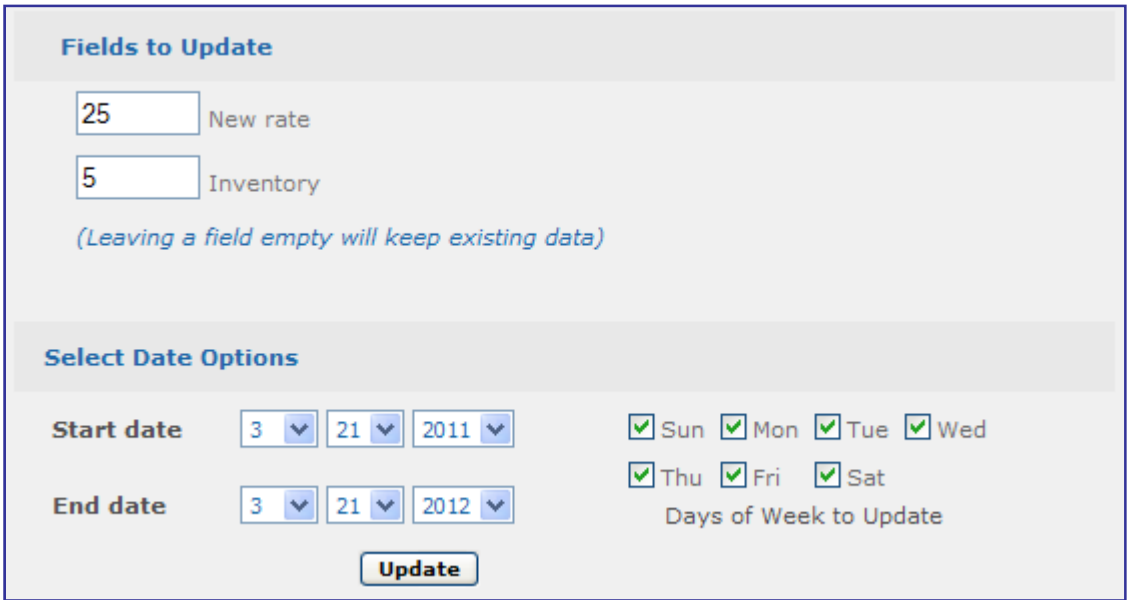
ADDING INVENTORIES

Once your new item is added, you can add rates and inventory for inventoried items. It is not necessary to perform this step if your item is created as a Static item that does not require an inventory.

1. Return to the Dynamic Packaging page
2. Click the **inventory/rates** link next to your new item

If all Days within a Range are priced the same and with the same inventory you can easily set the rate and inventory by adding a rate and inventory amount to the **Fields to Update** fields. Then select the date range to quickly save the data to all days within the selected range.

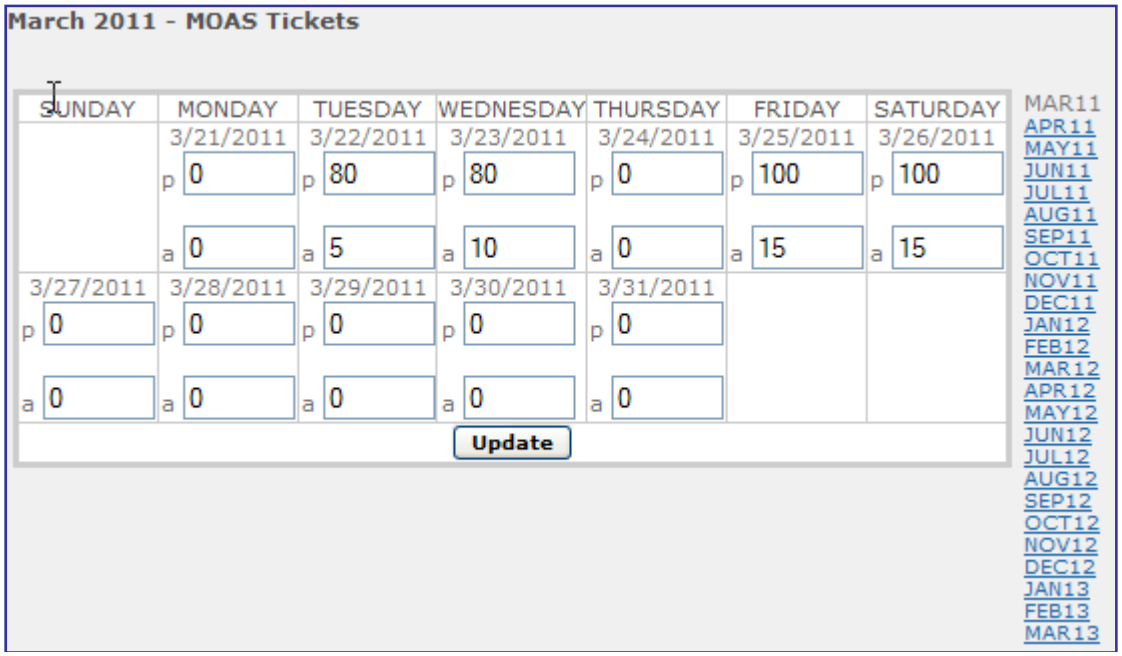
You can further restrict your entry by selecting the days of the week to apply your entries to. If you want to offer an item on some days and not others, uncheck the days that the item is not available. See the examples below.



If items are not uniformly available during a date range, you can instead edit the calendar fields manually to enter in the price and allotment for each day individually.

SETTING PRICES/INVENTORIES THAT DIFFER FROM DAY TO DAY

You can manually add or adjust the prices and/or inventories in the fields on the calendar. Enter the information only on the days you want that price and inventory to be available, you can leave days blank.



NOTE: The "P" signifies a price field, and an "A" signifies allotment or inventory.

ADDING IMAGES

Each Dynamic Packing item can have multiple photos.

1. In the Dynamic Packaging Administration page/main page, click on Photos
2. Select the item, from the drop down, that you would like to add photos to
3. Click on the Upload Photos link
4. Choose the Browse… button to find your photos and the click on upload. You may upload multiple images.

Helpful Hints!

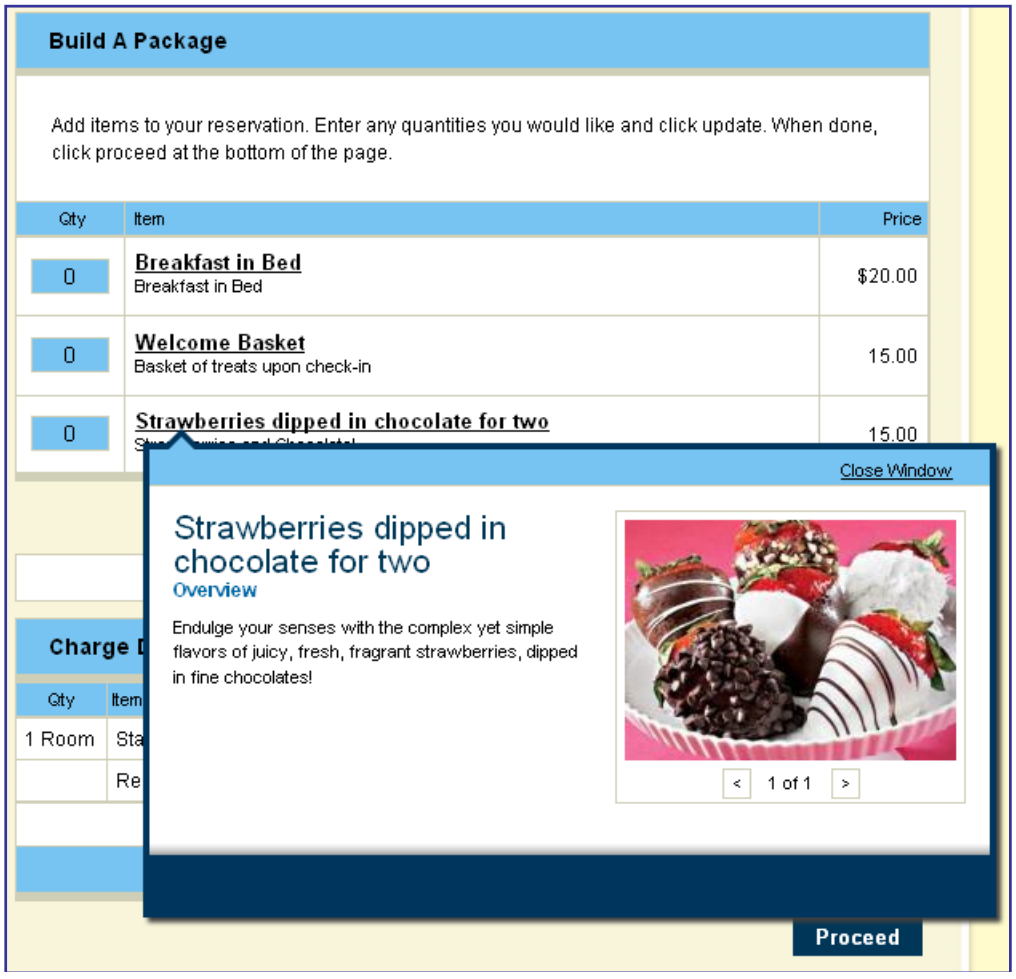
File types allowed are jpg, jpeg, gif, png, and bmp. Maximum image size is 50MB.

LIST PRIORITY

You can control the order of the items in your Dynamic Packaging list.

1. In the Dynamic Packaging Administration page/main page, click on **Change Priority**
2. On the next page, you can sort the items by numbers from 0 – 1000. The highest priority number will be listed first and the lowest number at the bottom of the list.

Here is an example of how your item will display to your guest.



Group Reservations Module

The Groups Module allows you to setup Group events with rates and rooms that are created especially for individual groups. In addition the Group's Coordinator can post announcements and agendas that can be seen by the attending guests during the reservation process. This makes the online reservation process very individualized to the group and enhances communication between the attendees and their coordinator.

THE GROUP COORDINATOR HAS THE ABILITY TO LOGIN TO VIEW THE FOLLOWING ITEMS

- **Current Rooming List** –shows all reservations that have been made and which rooms have been booked as well as the guest name.
- **Inventory Remaining** – this area shows all rooms that are available to their group, listed on a day by day basis. This is helpful in ensuring that enough rooms are available for the group.
- **Agenda** – the group coordinator can post an agenda for the guests to see during their reservation process. This allows the group coordinator to communicate information or a schedule of events, if desired.
- **Announcements** – this is an area to offer information to the group attendees, which can be edited by the group coordinator.
- **Book a Reservation** – the group coordinator can also book a reservation from the group administration screen

THE GROUP ATTENDEES CAN LOGIN WITH AN ATTENDEE PASSWORD TO VIEW THE FOLLOWING

- **Group image** or logo on their group page.
- **Announcements**
- **Agenda**
- **Rooms and Rates** that are offered specifically to their group.

All of these features are accessed by the group via a password for the attendees and a separate password for the Group Coordinator.

STEP 1 – CREATING A GROUP

1. In the Group Module, click on **Add a New Group**
2. On the Group Information form you will see a form to add the details of the group information, including reservation password, Group Coordinator information and password, Hotel Contact Information, Meeting Dates, Dates to Offer Rates as well as a Cutoff date for making reservations.
3. You can also create rate descriptions, both short and long, and the low inventory remaining threshold.
4. Click the **Submit** button when you have added all of the group information to save your changes.

Helpful Hints!

Group Coordinator Password and **Group Password** should be different passwords or it will cause errors in the booking engine. Passwords should be at least 6 characters.

Meeting dates typically include "shoulder" dates, if you want to offer the groups rates a day or two prior to arrival or after departure. The meeting dates and dates to offer rates can also be the same time frame

.

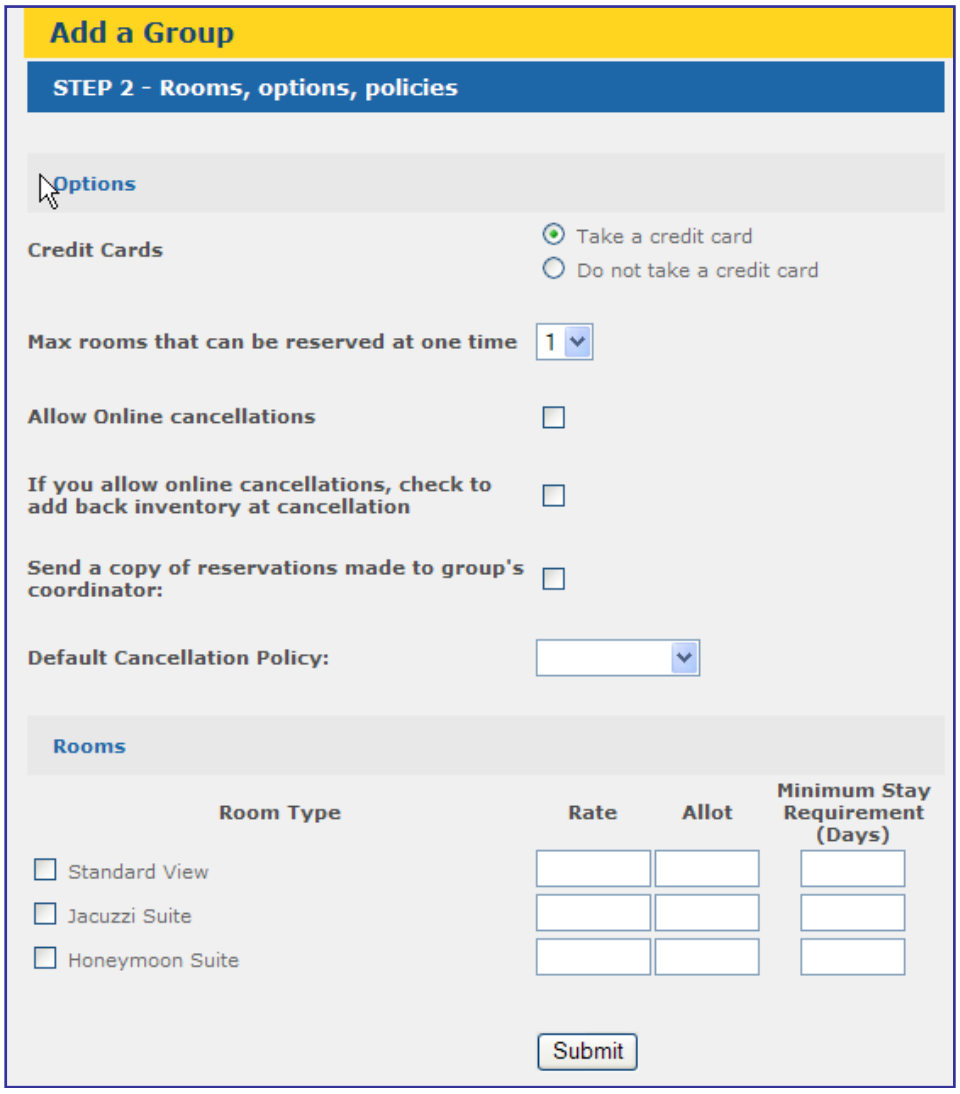
After completing Step 1, you will then see the Step 2 page to continue adding the needed information.

STEP 2 – CREATING A GROUP

1. Select the **Credit Card** option, **Max number of rooms** that can be booked at one time online, option to **allow online cancellations**, send a **copy of the reservations to group coordinator** and the **default cancellation policy.**

2. You will also select the **room types** to be offered, the **group rate**, **allotment/inventory** and **Minimum length of stay** (if required).

3. Click the **Submit** button to save your changes.



After submitting this page, you will see a summary page confirming that your new group has been setup.

MAKING CHANGES TO YOUR GROUPS

1. Navigate to the **Groups** page in **Edit Settings**
2. Choose the group you want to work with and click the submit button.
3. You can edit information on this page, like general group information or changing meeting dates.
   You may only edit information until the first group member logs in using the password.

Helpful Hints!

If changing meeting dates or cutoff dates please be sure to click on the Change Meeting Dates link. **It is important to note that if you do change this information it will reset your rates and inventory to zero and would need to be added again in Rate Administrator.**

4. **Group Room Edit** – allows you to add or remove rooms to be available for use in this group.

5. **Cancellation/Rate Description** - options for allowing online cancellation, changing your short or long rate description and option for showing low inventory remaining message.
6. **Agenda** – adjustments to the Agenda - typically handled by Group Coordinator
7. **Group Image** – upload an image to the group login page.
8. **Group Manager** – brings you back to the page where you can select another group to work with.

MAKING CHANGES TO THE GROUP RATES

You will need to navigate to the **Rate Administrator** page to make changes to group rates or inventory. On the Rate Administrator page, follow the procedure listed below.

1. Click on **Groups** in the left navigation panel and then choose a Group to manage.

2. Verify that rate name is displaying the name of the Group that you wish to edit.

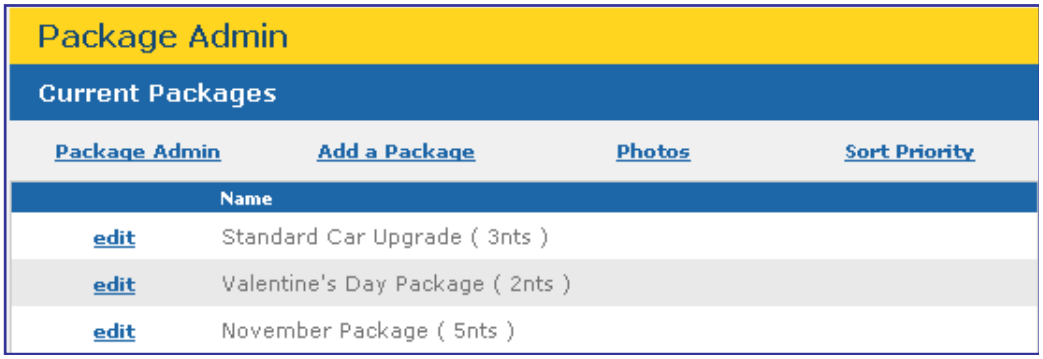
Group Rate Admin
Check to ensure that the correct group rate is selected.
Rate:
Vizergy User's Conference
View/Print Rates / Inventory / Minimums

You can update the Rate and Inventory in the **Edit by Room Type without seeing current data** portion of the page, or if only a small change is needed you can edit either rate or inventory or minimum night stay in the **Edit Current Data** portion of the page.

Creating & Editing Packages

Packages are a great incentive for guests to book with your property. In this section, you will learn how to create packages to promote online, how to set descriptions associated with your packages and how to edit them later as your needs change.

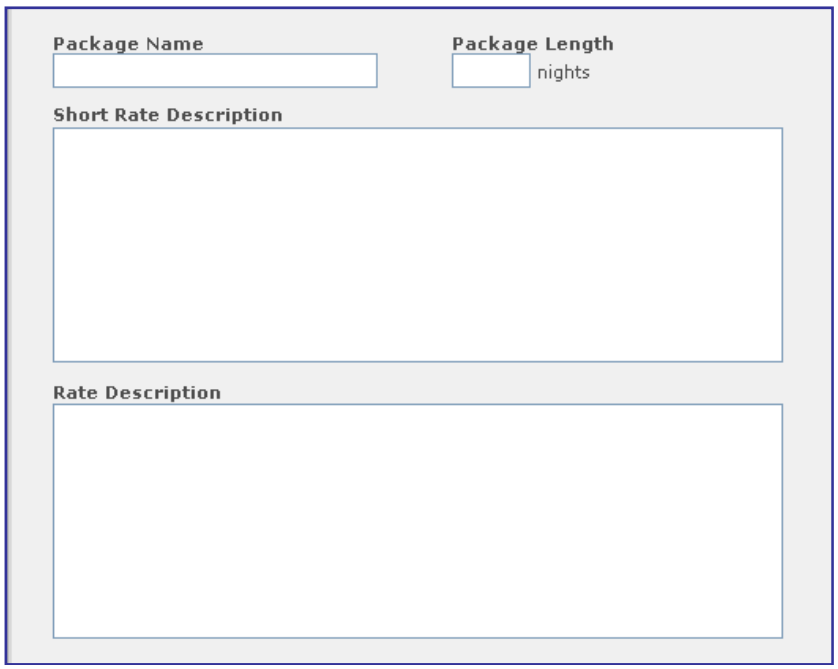
You will find a Packages link to create and edit packages on the **Edit Settings** navigation menu. Clicking the **Packages** link will direct you to the **Package Admin** page.



From this **Package Admin** page you can select an existing package to **Edit**, **Add a Package**, Upload **Photos** for your Packages, or **Sort Priority** of the display order. From this page you will also have the ability to **Add New** packages.

CREATING A NEW PACKAGE

1. Click on **Add a Package** from the **Package Admin** page to begin setting up your new package.



2. **Package Name** — Enter the name of your package. Maximum length for package names is 30 characters.

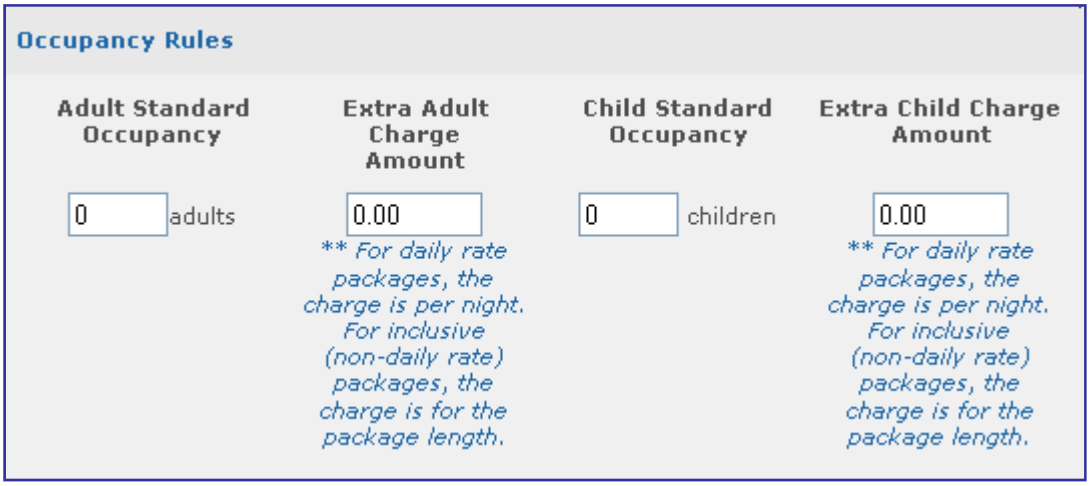
3. **Package Length** — Enter the number of minimum number of nights required to book the package. The maximum package length is 14 days. Guests can still book additional nights past the standard package length, if you choose that option (see Accept Extra Room Nights, below).

4. **Short Rate Description** — Enter the short description of the package here. This text will appear directly to the right of the package name on your website reservation page. Maximum length for the package short rate description is 50 characters.

5. **Rate Description** – Enter the description of the package here. This text will appear when the guest clicks on the name of the package to open up a description window. Maximum length for the package description is 1600 characters.

OCCUPANCY RULES

1. **Adult Standard Occupancy** — Specify how many adults can stay at this package rate in the room selected. If the number of adults exceeds the standard occupancy for the room, the extra adult charge will be added for each adult over the standard occupancy.


Occupancy Rules
Adult Standard Occupancy
Extra Adult Charge Amount
Child Standard Occupancy
Extra Child Charge Amount
0
adults
0.00
** For daily rate packages, the charge is per night. For inclusive (non-daily rate) packages, the charge is for the package length.
0
children
0.00
** For daily rate packages, the charge is per night. For inclusive (non-daily rate) packages, the charge is for the package length.

2. **Extra Adult Charge** — Enter the total charge to add an extra adult.

3. **Child Standard Occupancy** — Specify how many children can stay at this package rate in the room selected. If the number of children exceeds the standard occupancy for the room, the extra child charge will be added for each child over the standard occupancy.

4. **Extra Child Charge** — Enter the total charge to add an extra child.

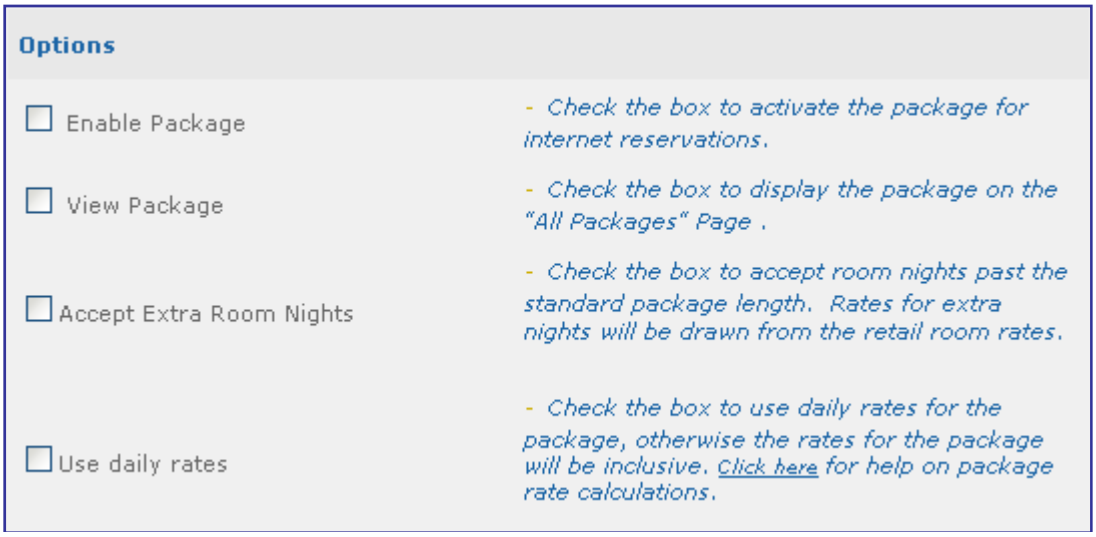
OPTIONS – the following options are available

1. **Enable Package**— This feature allows you to activate, or enable your package on your booking engine by simply checking the box. A package that is not enabled will not display on the booking engine and cannot be used to book a reservation.

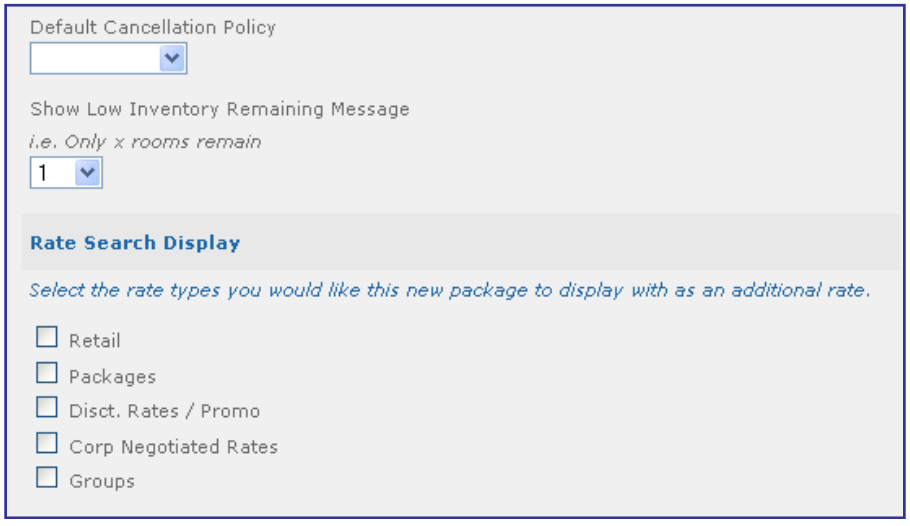
2. **View Package** — This option allows this package show on the page that displays all of your packages together.

3. **Accept Extra Room Nights** — Check the box to accept room nights past the standard package length. Rates for extra nights will be drawn from the retail room rates. This feature can be turned on or off for each package.

4. **Use Daily Rates –** This feature allows you to load your package rate at a nightly rate, rather than a total package price. So rather than adding the total package price, you would need to add a nightly rate instead.


Options
Enable Package
- Check the box to activate the package for internet reservations.
View Package
- Check the box to display the package on the "All Packages" Page .
Accept Extra Room Nights
- Check the box to accept room nights past the standard package length. Rates for extra nights will be drawn from the retail room rates.
Use daily rates
- Check the box to use daily rates for the package, otherwise the rates for the package will be inclusive. Click here for help on package rate calculations.

5. **Default Cancellation Policy** – You can select the cancellation policy you would like associated with this package from the dropdown. By doing this, the selected policy will automatically be assigned to the rate.


Default Cancellation Policy
Show Low Inventory Remaining Message
i.e. Only x rooms remain
1
Rate Search Display
Select the rate types you would like this new package to display with as an additional rate.
Retail
Packages
Disct. Rates / Promo
Corp Negotiated Rates
Groups

6. **Show Low Inventory Remaining Message** – This option will allow the guests to be alerted to the number of rooms remaining in a specific room type. By selecting the NO option, this feature will be deactivated.

7. **Rate Search Display** – By checking any of the boxes below, this new package will appear with the selected rate when a guest searches availability. By keeping all boxes unchecked, it will not display during a search.

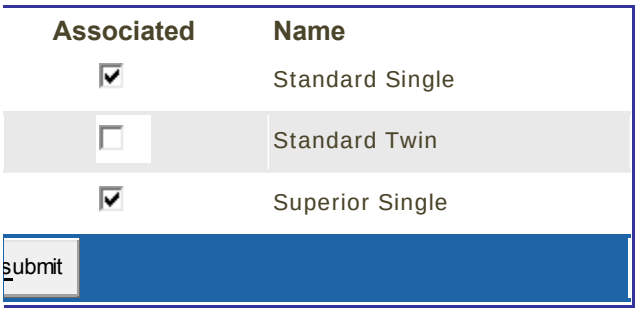
ADDING ROOMS TO YOUR PACKAGE

After filling in all of the information on the package setup page, you will click the Associate Rooms link on the confirmation page to add your rooms to this package.

In the **Associate Rooms** screen you will be offered the ability to select the room types you want to use for the package.

IMPORTANT: When done select the **Click to save Changes** button to save changes. If you do not click this button, changes will not be recorded. If successful, the screen will report "**The changes have been made**."

Frame this package directly – Each package, when created, is given a unique URL that can be used to send a guest directly to the package to make a reservation. This link is found at the bottom of the Package setup page after the package is saved.



SETTING THE PRIORITY ORDER

On the Package Admin page you have a **Sort Priority** option. This option allows you to set the order in which your packages display when they display as a list. You can use this feature to show your seasonal or promotional packages at the top for maximum visibility.

SETTING AND CHANGING PACKAGE RATES

In **Rate Administrator** there will be a section called **Packages** on your navigation bar. There you will select the package you want to set rates for.

You will see the familiar **View/Print Rates** report tool at the top of the page, as well as an **Edit Current Data** section. These are used exactly in the same way you would in your Retail Rate Administrator page.

The **Edit by room type without seeing current data** section is where you set your rates. This area will also look very similar to the page you see when adding other rates. There is a big difference however. After choosing a room type in the **Select the type of room** section, you will notice that the **Fields to Update** section only contains a field for the rate. Here you enter the rate for the entire package or the nightly rate (dependant on whether you opted to check the **Use Daily Rates** box during Package setup). You will not need to select inventory because your Package inventory is controlled by your retail availability. Your minimum night stay is controlled by your package length settings.

You will also see a check box to perform a full blackout for **all** rooms for this package. Selecting this check box will erase all rates for all rooms in this package for the dates you select in the Select Date Options section. To black out **one room** or only some of your rooms, you would first select the room you want to black out, and then enter a rate of "0". This will effectively make the room you selected unavailable for the date range you enter in the Select Date Options section.

Select Date Options and the Days of Week to Update: Select dates and days of the week you wish to offer this package at this price.

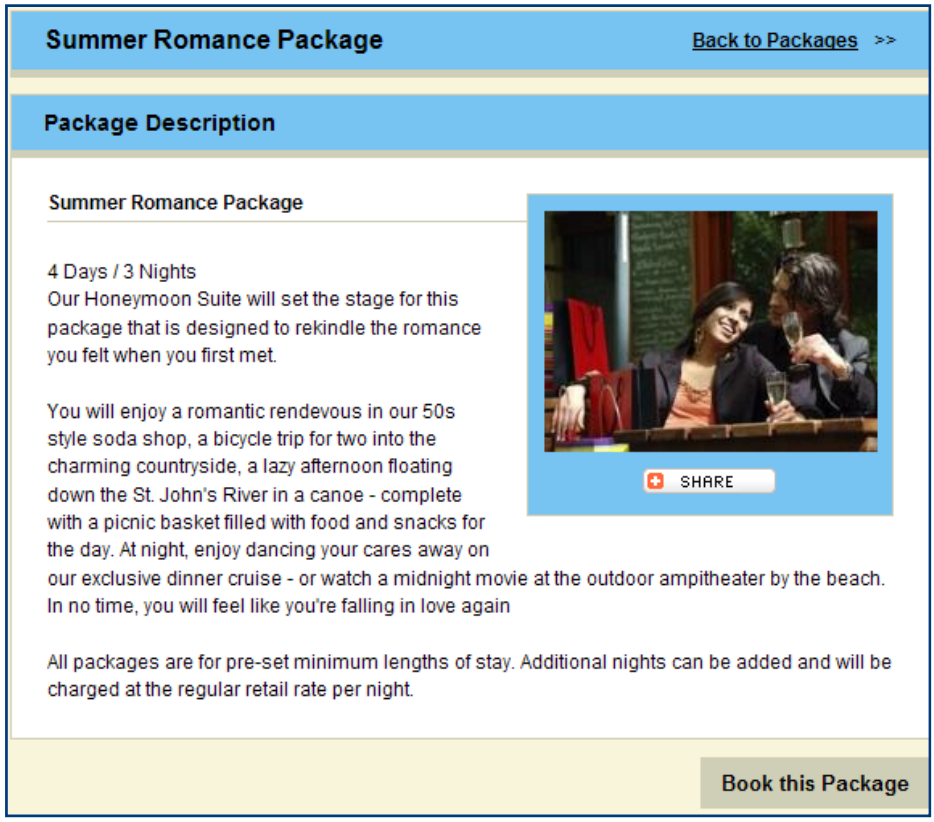
Click **Submit** when finished to save changes. If successful, the screen will report "**The changes have been made**." If you do not receive this screen, do not assume that the changes were made.

Helpful Hints!

Check your work by viewing the **View/Print Rates** section at the top of the Rate Administrator page. You can make changes to any of your package rates by returning to **Package Settings** or **Package Rate Administrator**.

Note: For any packages offering a free night, an additional step promotion would need to be created. See "Adding a Step Promotion" for additional steps

Here is an example of how your package will be displayed, complete with Package Name, Description and Photo. You can see how adding a photo and a full description can make your package more attractive to your guests.

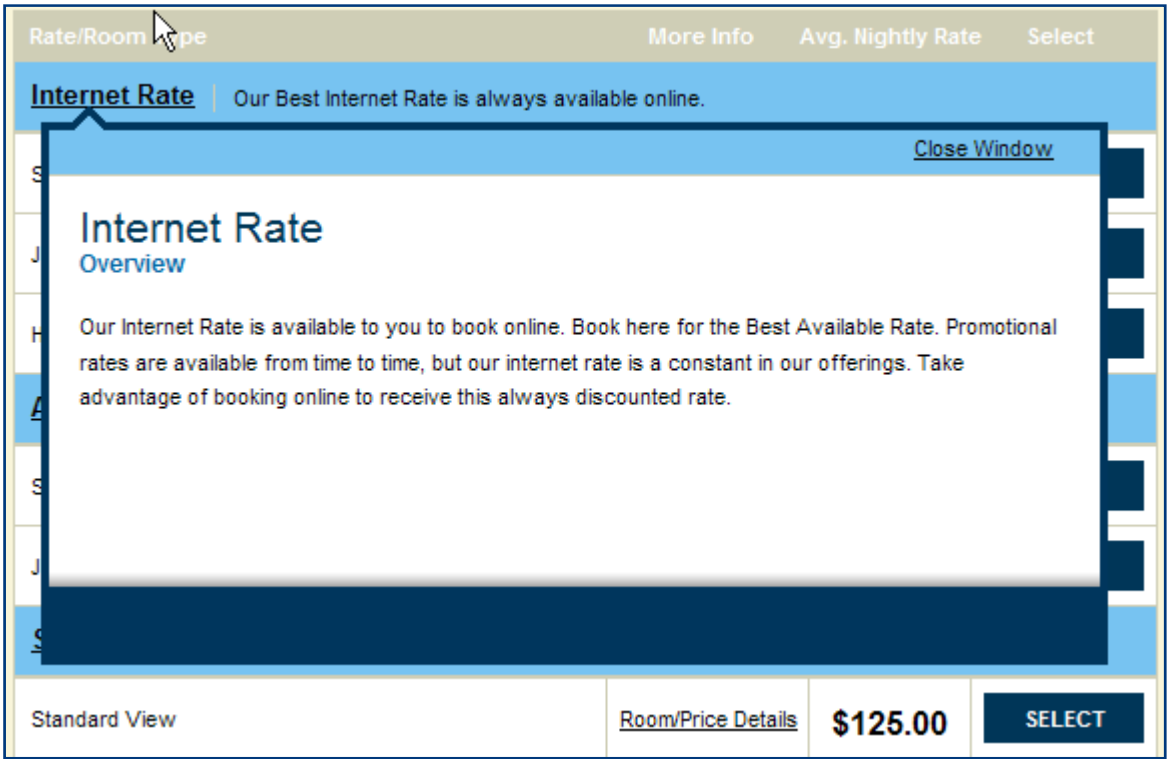

Summer Romance Package
Back to Packages >>
Package Description
Summer Romance Package
4 Days / 3 Nights
Our Honeymoon Suite will set the stage for this package that is designed to rekindle the romance you felt when you first met.
You will enjoy a romantic rendevous in our 50s style soda shop, a bicycle trip for two into the charming countryside, a lazy afternoon floating down the St. John's River in a canoe - complete with a picnic basket filled with food and snacks for the day. At night, enjoy dancing your cares away on our exclusive dinner cruise - or watch a midnight movie at the outdoor ampitheater by the beach. In no time, you will feel like you're falling in love again
SHARE
All packages are for pre-set minimum lengths of stay. Additional nights can be added and will be charged at the regular retail rate per night.
Book this Package

Retail Description

The last item in the **Reservation Modules** section is your **Retail** Rate. On this page you will be able to customize the name of your Retail rate. You may want to call it something other than Retail in order to make your guests feel that they are seeing your internet rate rather than your standard RAC rate.

Additionally, you can give your rate a short description which will display next to the rate name on your booking pages. Lastly, you will want to give your rate a description. These fields allow your guests to view details about the retail rate while making their selection.

Here is an example of how it will appear on your website. In this example the Retail rate name was edited to display as Internet Rate. You can change the name to display any name or description you choose.

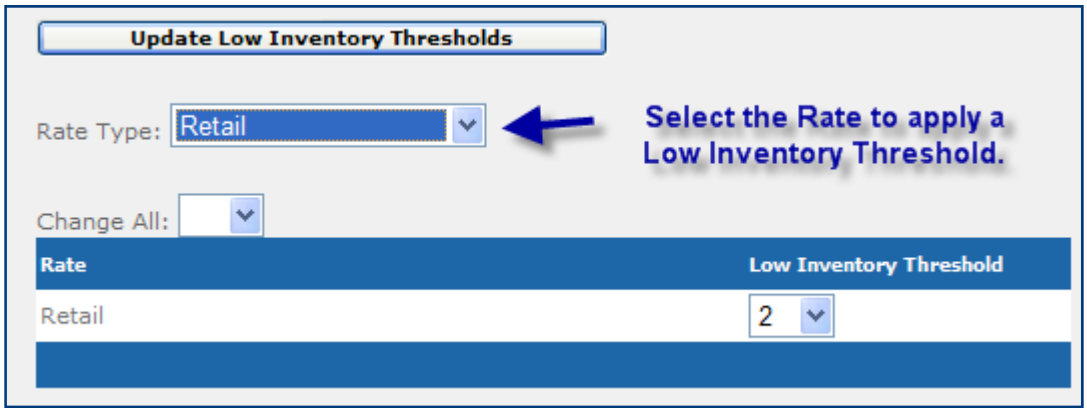

Rate/Room Type
More Info
Avg. Nightly Rate
Select
Internet Rate
Our Best Internet Rate is always available online.
Close Window
Internet Rate
Overview
Our Internet Rate is available to you to book online. Book here for the Best Available Rate. Promotional rates are available from time to time, but our internet rate is a constant in our offerings. Take advantage of booking online to receive this always discounted rate.
Standard View
Room/Price Details
$125.00
SELECT

Low Inventory Messages

Low Inventory Messages allow you to inform your guests who are looking at rates on your website booking engine pages when there are a limited number of rooms available for a specific rate / room combination. This feature helps to make your guests aware when there is limited availability and it might be advisable not to wait to place the reservation. You can configure your Low Inventory messages to not display at all, or to display when thresholds of 1, 2, 3, or 4 rooms are available for a particular rate.

Each rate, promotion and package in the Secure-Res booking engine offers the ability to set a Low Inventory Message. The setting can be selected in each rate setup page. You can also set the Low Inventory Message from the **Low Inventory Messages** page in the **Promotional Tools** section of Edit **Settings**.

On this page you can select a rate to apply your **Low Inventory Message**. You may also select a general threshold to apply to all rates by selecting a threshold from the **Change All** field instead of using the rate specific drop down field.

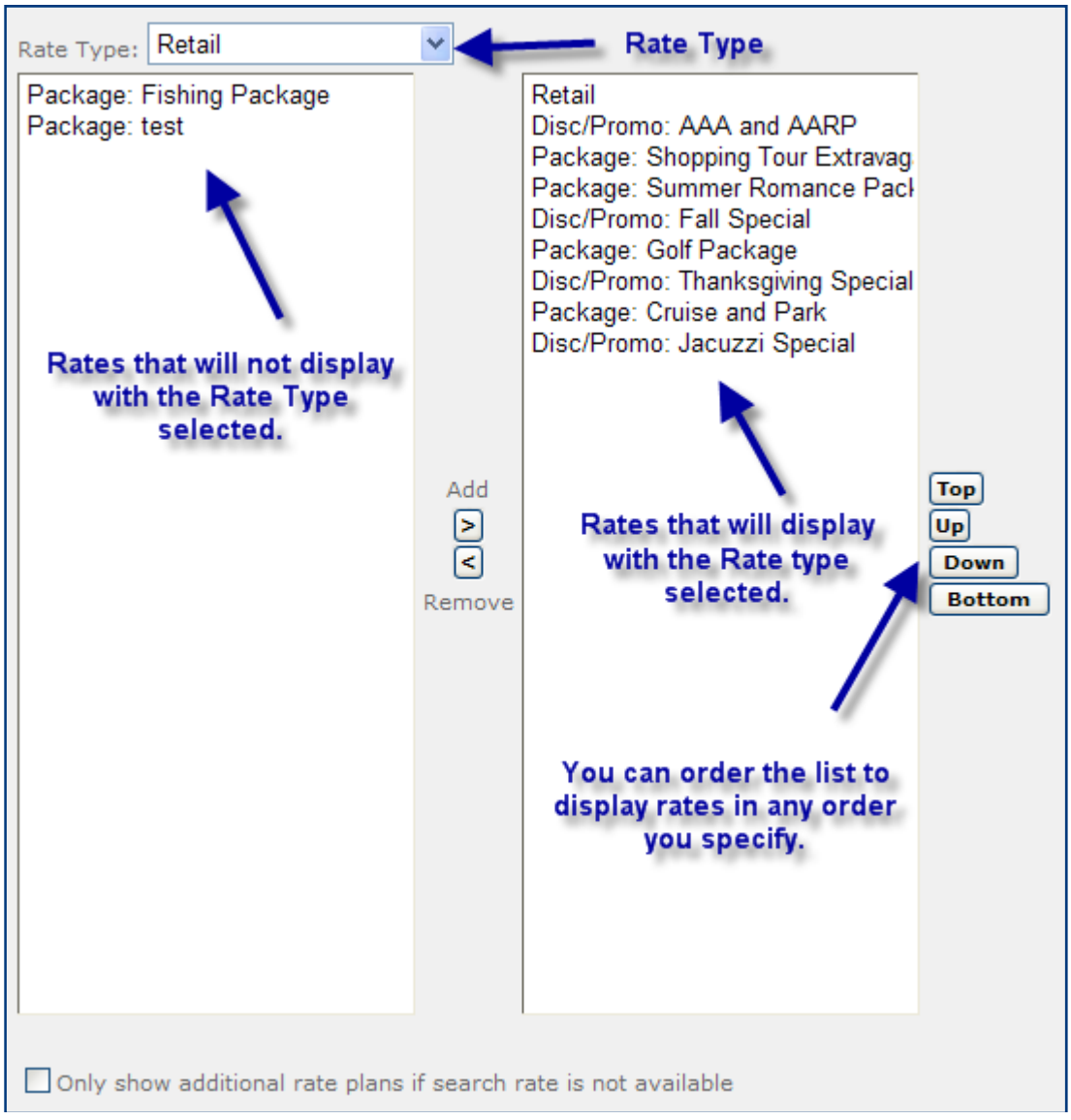


Low inventory messages will look like the following example when displayed on your website reservation pages. In this example the Jacuzzi Suite has only 3 rooms available. Since the threshold for this rate was set to 4, the Low Inventory Message will be displayed as there are fewer than 4 rooms available.

Rate Display Order

Rate Display Order is a powerful tool that allows you to control which rates show in searches, and which rates do not. While Rate Display Order is a great tool in managing how your rates are displayed, it is an often forgotten step in the rate setup process. This section should help you to fully understand its functionality so that you have ultimate control of which rates are displayed and in which order they appear.

On the Rate Display order page, you will see a Rate Type drop down menu, and two columns.



The example above shows that in a general Retail rate search, the Disc/Promo rates will also show, along with the selected Packages. The column on the left shows that rates that do not show up with Retail rates in a search. So keep in mind that the right hand column shows the rates that will display, while the left hand column shows rates that do not display with the selected rate type.

When creating a new Package or Promotional Rate you will need to assign the rate to display in the Rate Display Order page.

Helpful Hints!

When creating a promotional rate or package, you will see a **Rate Search Display** tool that allows you to set the Rate Display option without having to set it on the Rate Display Order page. However, subsequent changes to the rate display order can only be done in the Rate Display order page.

Corporate/Negotiated Rates can only be displayed if the guest enters the password associated with the rate, and will not display otherwise; however, you may opt to have other rates display with the corporate rate after the password is entered.

Promotional Rates can be displayed in a variety of ways. If you want a specific promotion to only display to guests who have a pass code, make sure that the promotion does not display with any other rate types. This will ensure that only a pass code will display the promotional rate.

Package Rates – Some hotel websites have links on the website to specific packages and only wish to display that package alone, while others prefer to present all of their packages together for comparison. Either scenario is controlled through the Rate Display Order page. If your Packages are not selected to display with any of your rates, then when they are linked to directly, no other packages will display (see Packages for details on direct links). If all of your Packages are grouped to display together under the Package Rate Type, then any package that is linked to directly will display along with the other packages selected.

You can see now how you can mix and match which rates display with other rates and which rates do not display at all unless a direct pass code or link is used to find them.

Helpful Hints!

If a rate is not displaying on your booking engine check your **Rate Display Order page** to ensure that the rate is selected to display with the rates that you want it to display with.

Step Promotions

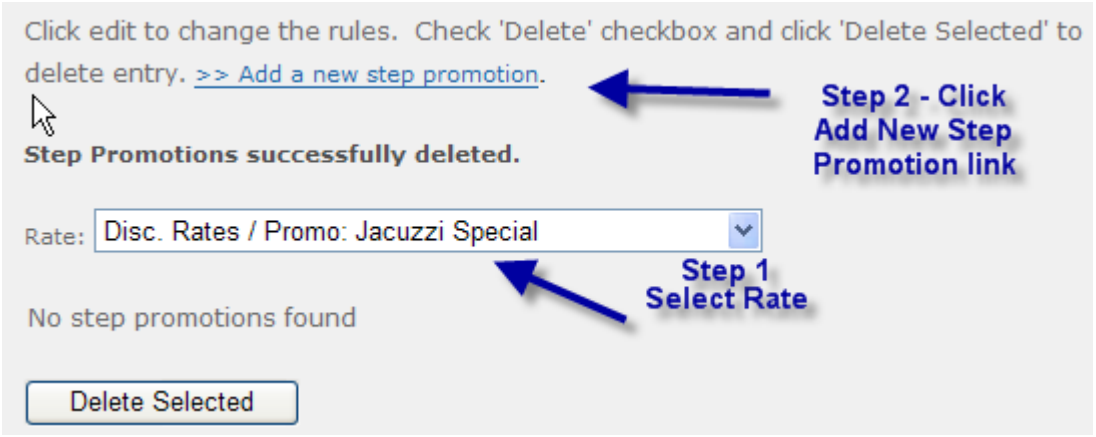
Step Promotions allow greater flexibility in the way that you can offer discounted rates to your guests. You might want to offer a free night stay with a minimum length of stay. Or perhaps you want to display strike through pricing on a promotional rate or package to show your guest the savings that they are receiving. Adding a step promotion allows those options, plus a number of other options also.

SETTING UP A STEP PROMOTION

To add a step promotion to an existing rate or package you can select "**Manage Step Promotions**" from the edit screen of the Promotion or Package. You will see a section that looks like the example below.

You can also setup your Step Promotions by selecting the **Step Promotions** link in your **Promotional Tools** in **Edit Settings**.

- Begin by selecting the rate, package or promotion that you wish to add a step promotion to


Click edit to change the rules. Check 'Delete' checkbox and click 'Delete Selected' to delete entry. >> Add a new step promotion.
Step 2 - Click Add New Step Promotion link
Step Promotions successfully deleted.
Rate: Disc. Rates / Promo: Jacuzzi Special
Step 1 Select Rate
No step promotions found
Delete Selected

- Click on **Add a new step promotion** link.
- Choose **Arrival Start** and **End Date** for this promotion to be available during.
- **Select Weekdays** on which the guest may arrive for this promotion.
- Choose **Length of Stay**. This area will allow you to set a **minimum night stay** as well as a **maximum night stay**.
- **Effective Night** is the night during the stay that the discount will begin applying (i.e. 1 for first night, 2 for 2nd night or *Last* for Last night).
- **Effective length** is how many additional nights the discount will apply to. Effective night and effective length can not add up to more then the Maximum Length of Stay. If the discount applies for the full stay then the Effective night would be 1 and the effective length (remaining nights) would be 13, for a total of 14 nights.

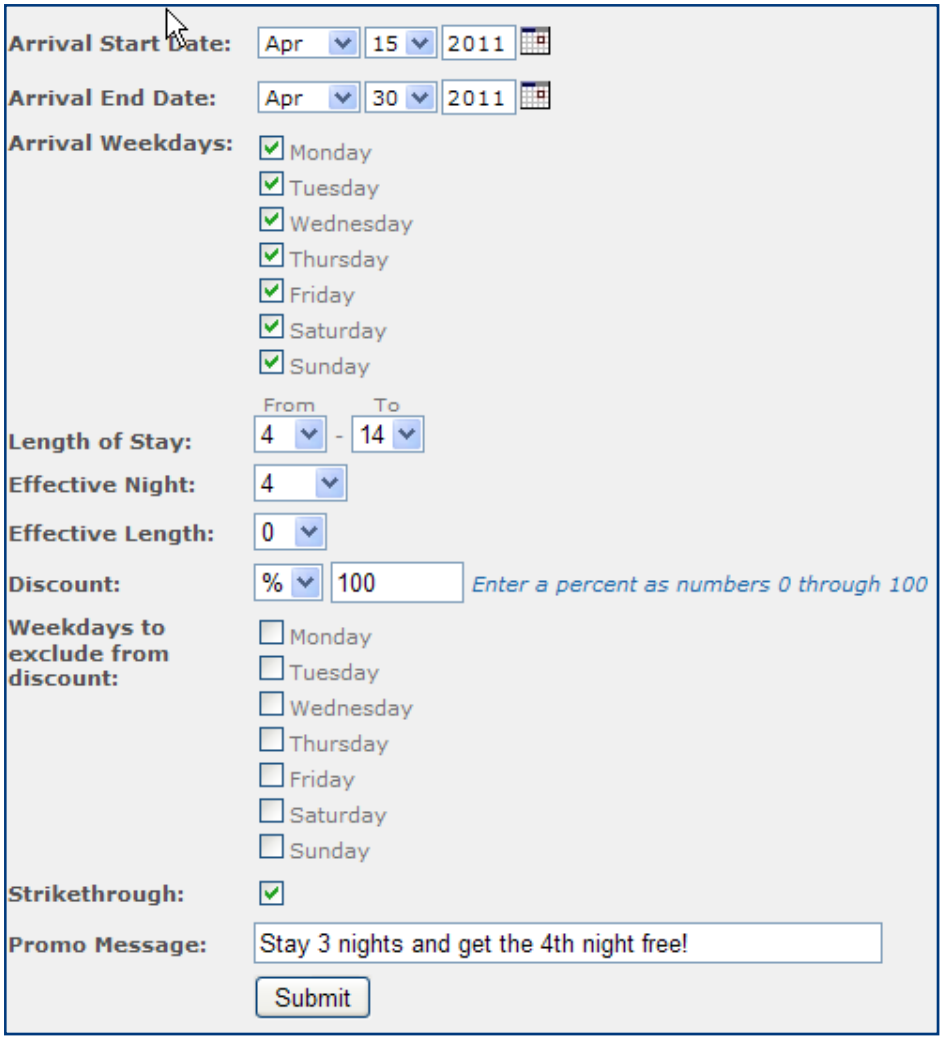
- Choose **Discount type** $ or % and enter amount or percent in the text box. A positive number gives a discount (Do not enter a negative sign here). This number must be a full number, and cannot contain decimal points.
- Choose **weekdays to exclude** the discount from if applicable
- Check **Strikethrough** box if you would the guest to see the original price crossed out with the discounted price below.
- Enter **Promo Message** (i.e. Stay 3 Nights and Get 1 Free)

EXAMPLE: CONFIGURING A FREE NIGHT PROMOTION

Below is an example of configuring a free night stay for guests who stay 4 nights or more.

Length of Stay would be 4 - 14
Effective night would be the 4th night,
Effective length would be 0 - No additional nights would receive the discount
Discount would be 100%.

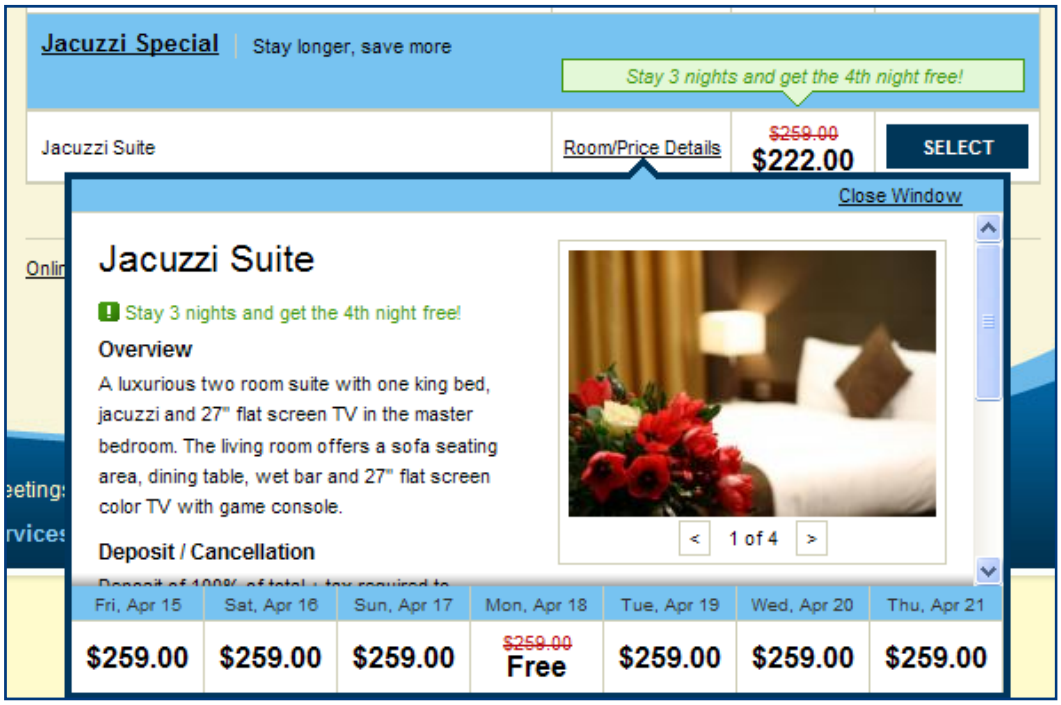
Your promotion may have different rules, but you can use the same process to set up discounts or free nights.



Below you will see how the promotion with the free night shown above will look to the guest when they select a stay of 4 or more nights.

Example: 4th Night Free Step Promotion

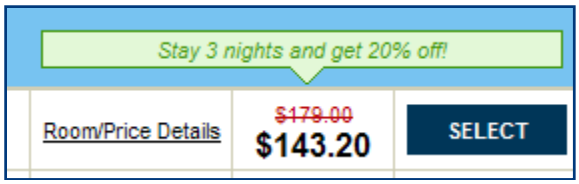
This screen shot shows how the 4th night free step promotion would display to a guest who meets the requirements of the stay.

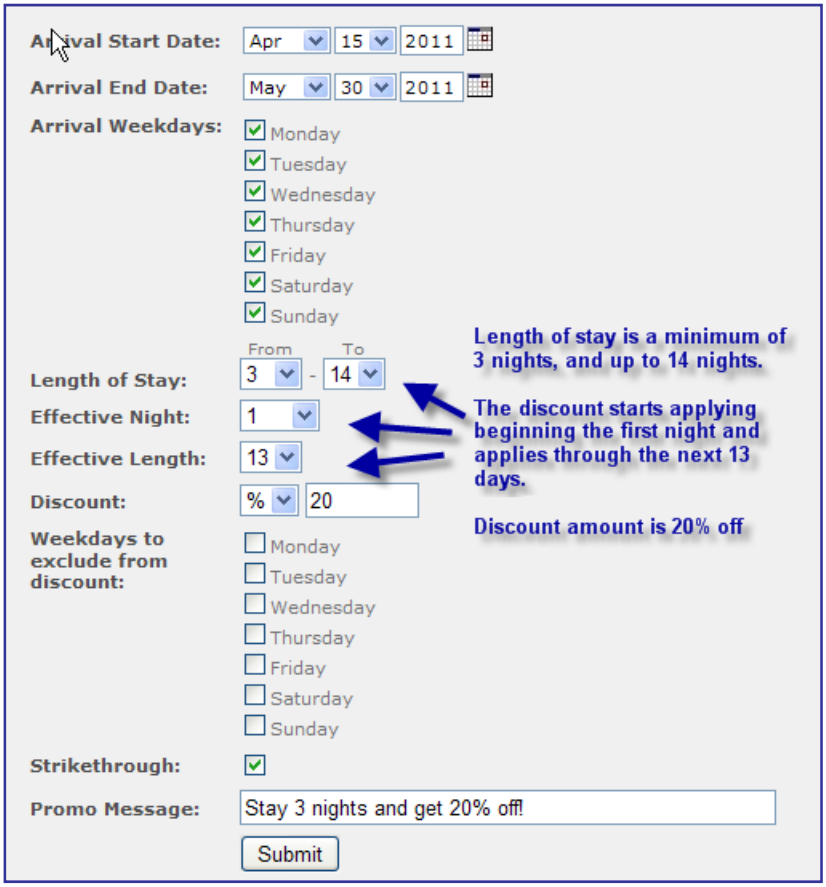


Example: Setting Up a 20% discount for stays 3 nights or more of the Retail Rate

- To add a step promotion to your Retail Rate, select the Retail Rate on your Step Promotions page.
- Follow the options listed on the right, using your specific requirements.

This setup will offer 20% off to guests who stay 3 nights or more.





Helpful Hints!

The step promotion setup page allows you to also control the **arrival days** as well as to exclude certain days. So if you did not want to offer the promotion to guests who arrive on a certain day, check the box for that day and the promotion will not be displayed for guests arriving on that day.

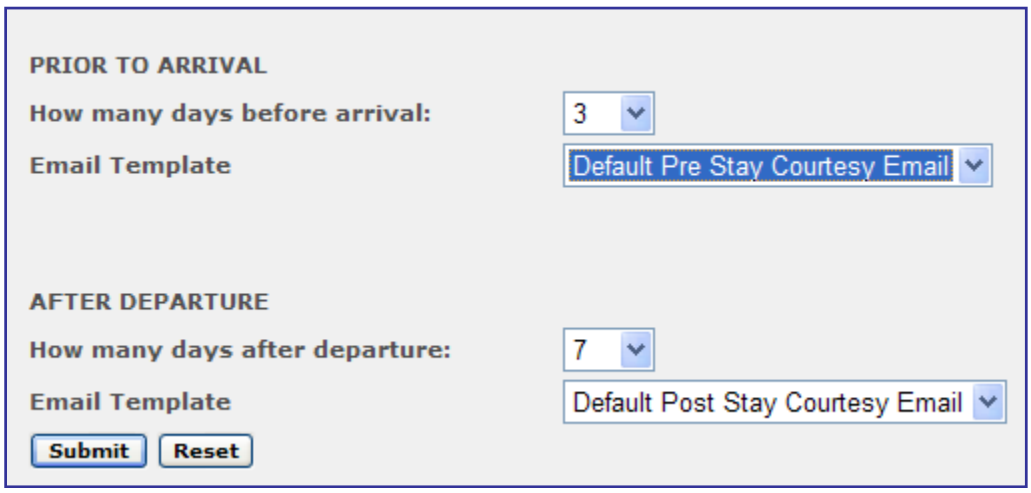
If you wish to **exclude a day**, whether or not it an arrival date, you may select it in the Weekdays to exclude area. These exclusions allow you to keep your prime days from receiving a discounted rate.

Low Inventory Messages, **Rate Display Order**, and **Step Promotions** can all work together to make sure that your promotions are displayed just the way you want them to. The strike through feature and descriptions make your guests aware of the savings that they are receiving, while the Low Inventory messages encourage booking sooner, and Rate Display Order ensures that your rates display together with other rates, or alone without other rates.

Courtesy Email

You can easily setup automated messages to be sent out to guests who book, prior to their arrival and after their departure. This feature allows you to make your guest feel welcomed and appreciated. To enable messaging select **Courtesy Email** from the **Email Messages** section in **Edit Settings**.

From the selection tool you may select the number of days prior to the guest's arrival to send the **Pre-Stay Courtesy Email**, and how many days after departure to send the **Post Stay Courtesy Email**. If you wish to disable this feature, select "NO" instead of the number of days option.



Helpful Hints!

Keep in mind that for last minute reservations, you guest would not receive the Prior to Arrival email if the lead time is less than the number of days that is set.

This section enables or disables the Courtesy Emails. You will customize the content in the Email Templates area shown later in this section. You may select the default template, or create a custom template using the Email templates settings.

Email Harvesting

When guests book a reservation on your booking engine it captures their email address for you. However, you may wish to increase the ability to capture emails from other visitors to your website, even if they don't make a reservation. Emails from both sources can be used to send newsletters, email blasts, or other announcements.

The Email Harvesting tool allows you to create an incentive for guests to provide you with their email address, like an sign-up for a newsletter, or discount or giveaway of some kind. Guests will register for the incentive by filling out the form. Of course, your incentive will need to be valid, but is a great tool to provide something special in return for building your email database.

SETTING UP YOUR EMAIL HARVESTER

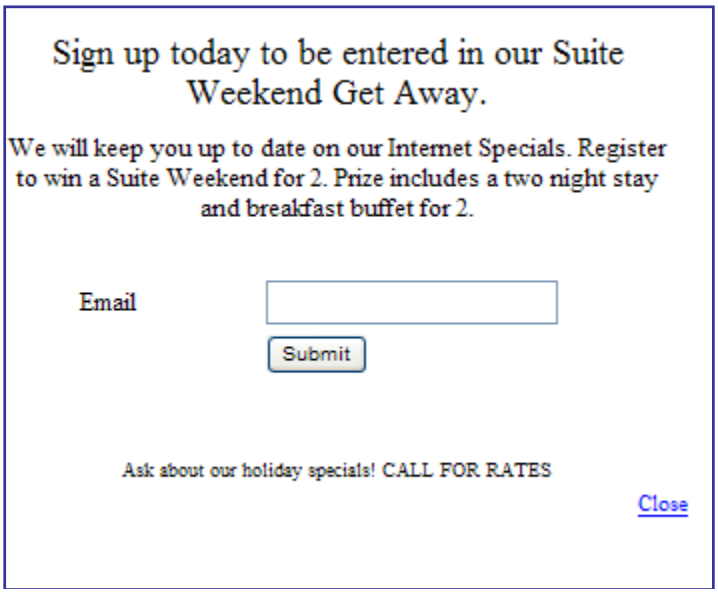
- Select Email Harvesting from Your Email Messages section of Edit Settings.
- Create Header, Body, and Footer text to describe your offer.
- Add your "Thank You" message that will be displayed after the guest submits the information.
- Select Font face and color.
- A field for email address will be provided in the form. You may also select other fields you wish to gather information for, such as Name, Address, City, etc.
- You may also upload a background image for the form – and you will see a field to specify the location of an online image to be added.

ADDING THE FORM TO YOUR WEBSITE

- Click to Save Changes after completing the form.
- On the confirmation page you will see a link for Email Capturing integration. Click on the **integration link**.
- Copy and paste the code in Step 1 into a document to forward to your webmaster.
- Copy and paste the code in Step 2 into the document to forward to your webmaster. The step 2 code is the direct link to the form you created.

Your webmaster should be able to easily implement the code into your website. You will then be able to immediately begin gathering email addresses from guests who fill out your form.

Below is an example of how the form might appear online.


Sign up today to be entered in our Suite Weekend Get Away.
We will keep you up to date on our Internet Specials. Register to win a Suite Weekend for 2. Prize includes a two night stay and breakfast buffet for 2.
Email
Submit
Ask about our holiday specials! CALL FOR RATES
Close

ACCESSING YOUR SUBMISSION INFORMATION

You will be able to view all of your email submissions either via a reservation or through the Email Capturing Form in your Emails report in **Reports Review.** You can view more information regarding this report in the Reports Review section of this guide.

Email Templates

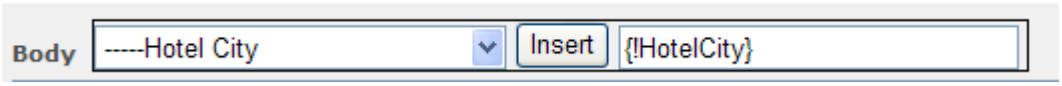
Email templates are available for you to customize the email messages that your guest and property will see when reservations are made or cancelled. You will also be able to customize the message in your Pre-Stay and Post Stay emails. You can also customize the copy of the reservation email or cancellation email that is delivered to your reservations desk if desired. You can also create your own custom templates instead of using a default template if desired.

CREATING AN EMAIL TEMPLATE

- Click the **Email Templates** link in your **Email Messages** section of **Edit Settings**
  Here you will view a list of the available email templates.

Add a new email template
Name
Type
Active
Edit Delete Default Guest Cancellation Email Guest Cancellation Email True
Edit Delete Default Guest Reservation Email Guest Reservation Email True
Edit Delete Default Post Stay Courtesy Email Post Stay Courtesy Email True
Edit Delete Default Pre Stay Courtesy Email Pre Stay Courtesy Email True
Edit Delete Default Property Cancellation Email Property Cancellation Email True
Edit Delete Default Property Reservation Email Property Reservation Email True

- Select an email template using the Edit link.
- You will see a field for **Name** and **Subject**. The name of the template is just for your identification and is not displayed to the guest. The subject line however will show as the subject line of the email that the guest receives.
- You will also see a tool to select a **Data Field** to insert automated text into your email template. This tool makes it very easy to add information about the reservation, guest or property that will automatically import into your email template.

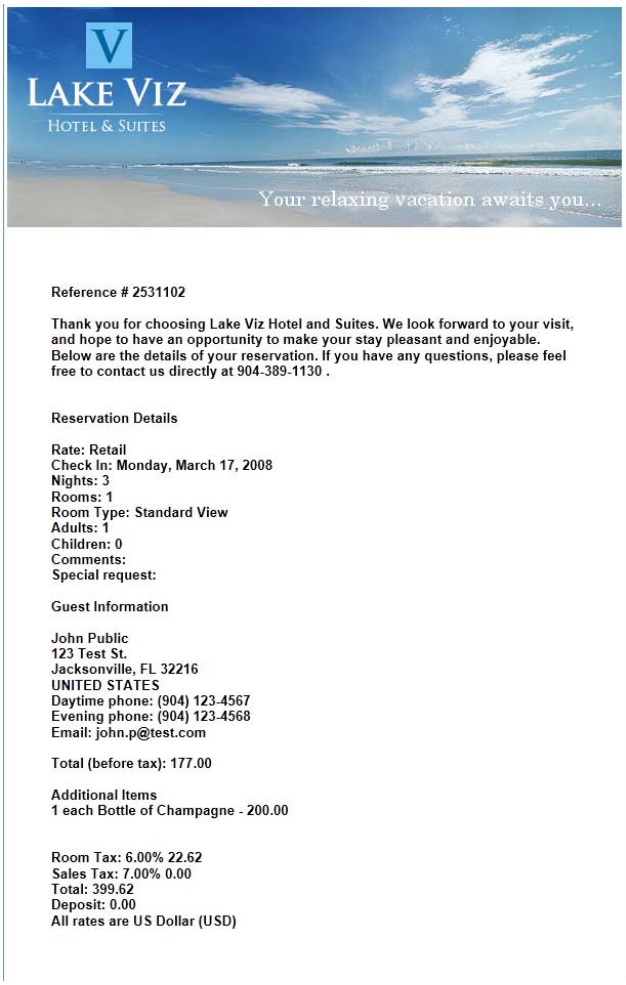


To insert a data field, choose an option from the drop down select field. Once a field is selected, you will see the code to insert displayed in the right hand column. Simply place your curser in the location on the page that you wish to insert the code, and then click the Insert button to add the code to the page. Alternately, you can simply copy and paste the code also. This procedure allows you to add information automatically to the email that is specific to each reservation.

You will note that the default emails already contain the information that is generally needed for each email template. But if for example, you wanted to remove the Total and Tax information from a cancellation, you can simply remove it from the page, or add other information instead.

- You can also customize each email template with your text. Perhaps on the reservation email you would like to include a welcome paragraph, or links to your local visitors' bureau website. You can add this information just by typing in the text you wish to add. You may also want to include a signature at the bottom, so that the guest has a name to contact with any concerns.

HTML EMAIL MESSAGES


LAKE VIZ
HOTEL & SUITES
Your relaxing vacation awaits you...
Reference # 2531102
Thank you for choosing Lake Viz Hotel and Suites. We look forward to your visit, and hope to have an opportunity to make your stay pleasant and enjoyable. Below are the details of your reservation. If you have any questions, please feel free to contact us directly at 904-389-1130 .
Reservation Details
Rate: Retail
Check In: Monday, March 17, 2008
Nights: 3
Rooms: 1
Room Type: Standard View
Adults: 1
Children: 0
Comments:
Special request:
Guest Information
John Public
123 Test St.
Jacksonville, FL 32216
UNITED STATES
Daytime phone: (904) 123-4567
Evening phone: (904) 123-4568
Email: john.p@test.com
Total (before tax): 177.00
Additional Items
1 each Bottle of Champagne - 200.00
Room Tax: 6.00% 22.62
Sales Tax: 7.00% 0.00
Total: 399.62
Deposit: 0.00
All rates are US Dollar (USD)

In addition to customizing the content that is displayed in your email templates, you have the option of converting the template to an html format that allows you to add images, logos, and any other options that might be possible on a web page. While it is best to keep the design simple, it is an added plus for your emails that confirm reservations, cancellations, and pre and post stay emails to look like your website or contain your logo.

To convert the email template to html, simply check the HTML Template check box below the Subject line. You will see a new set of tools appear, that allow you to easily insert images, links, tables, horizontal rule, as well as to format your font type, size, boldness, etc.

Here is an example of a customized html template.

Helpful Hints!

- You could insert a table, center it and then copy and paste your text into it. This will allow you to create a margin on the left and control where the text is positioned by resizing the table.
- Add a logo to the top of the page
- Change the header text for each section to bold.
- The Vizergy Design team can create a custom html email template design for you, or your own webmaster can login and create templates for you. It's easy and available to anyone with a login to your account.

Property Email Information

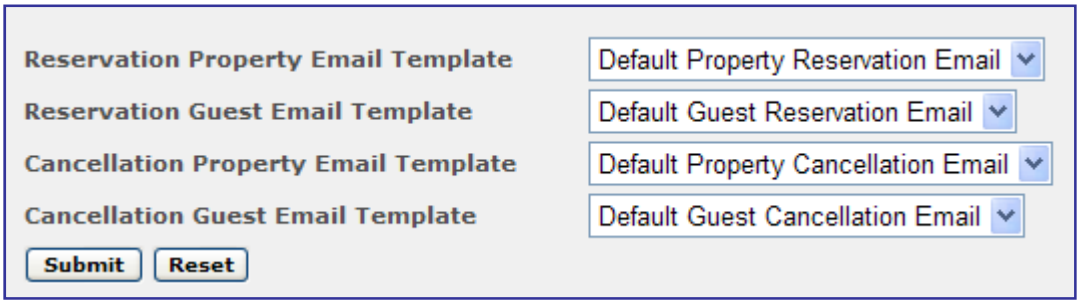
The Property Email Information page is a place to set up your important email address information for reservations and reports. The sections on this page include **Contact Information**, **Reservation Delivery**, and **Additional email contact addresses**.

- **Contact Information** – this area provides Vizergy with current information for contacts at your property should there be a question or a call from one of your guests. We will refer them to the contact person listed here.
- **Reservation Delivery** – This very important area controls where reservation emails are sent when a new reservation or cancellation is made.
- **Additional Email contact addresses** – This area provides additional addresses that can be used for contact or for setting up scheduled reports – more information on scheduled reports can be found in the Reports Review section of this guide.

Reservation Email

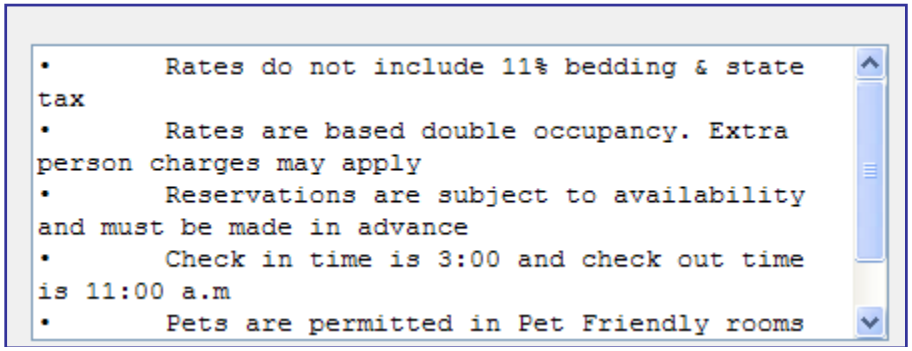
The **Reservation Email** area of **Email Messages** provides a tool to select which email template will be used for Reservation Property Email, Reservation Guest Email, Cancellation Property Email, and Cancellation Guest Email.

The Default Email Template will be selected if you have not created additional templates to select. For more information on using Email Templates, see the Email Template section of this chapter.



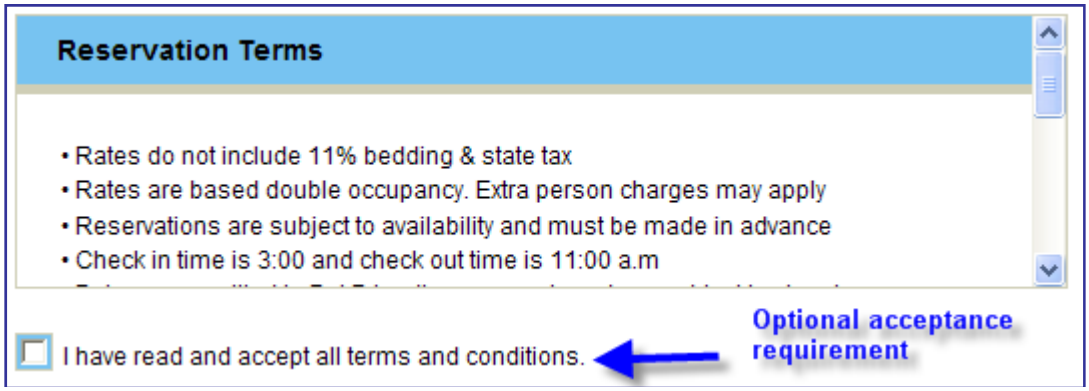
Disclaimer / Terms

The **Disclaimer / Terms** page offers you the ability to list any terms or conditions for reservations. You can type the information directly into the box provided, or if you want to include a bullet list, you can type them in a Word document and then copy and past it into the text box for Disclaimer / Terms.

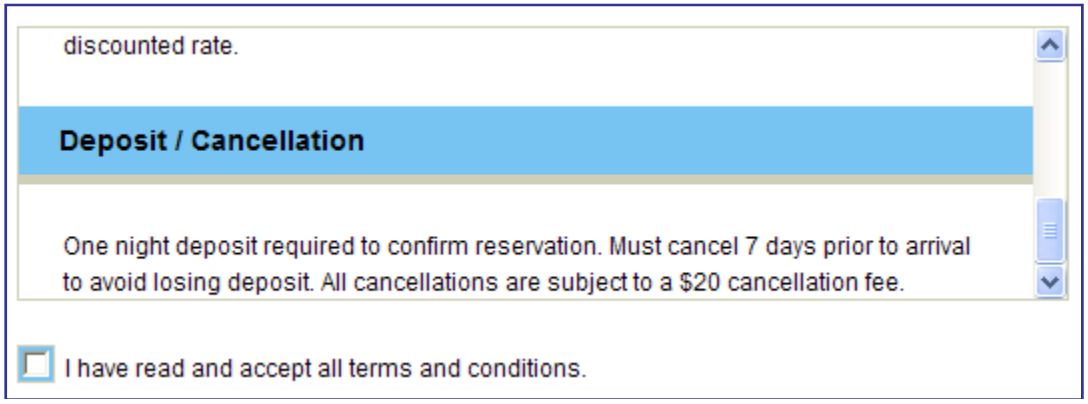

• Rates do not include 11% bedding & state tax
• Rates are based double occupancy. Extra person charges may apply
• Reservations are subject to availability and must be made in advance
• Check in time is 3:00 and check out time is 11:00 a.m
• Pets are permitted in Pet Friendly rooms

The Disclaimer / Terms will display on the reservation form page of your booking engine, and will include the selected rate description, and the **Deposit / Cancellation policy** associated with the rate that was selected.

You have the option to require that the guest check the box stating that they have read and accept all terms and conditions before allowing them to proceed with the reservations. This option is enabled in the **Edit Settings / Customization** page.


Reservation Terms
• Rates do not include 11% bedding & state tax
• Rates are based double occupancy. Extra person charges may apply
• Reservations are subject to availability and must be made in advance
• Check in time is 3:00 and check out time is 11:00 a.m
I have read and accept all terms and conditions.
Optional acceptance requirement

Above is an example of how the Reservations Terms box will display on your booking engine page.
Below is an example of the Cancellation Policy Display


discounted rate.
Deposit / Cancellation
One night deposit required to confirm reservation. Must cancel 7 days prior to arrival to avoid losing deposit. All cancellations are subject to a $20 cancellation fee.
I have read and accept all terms and conditions.

Deposits and Cancellations

Whether you have a single cancellation policy or a deposit requirement and many cancellation policies, you will be able to configure policies to suit you needs.

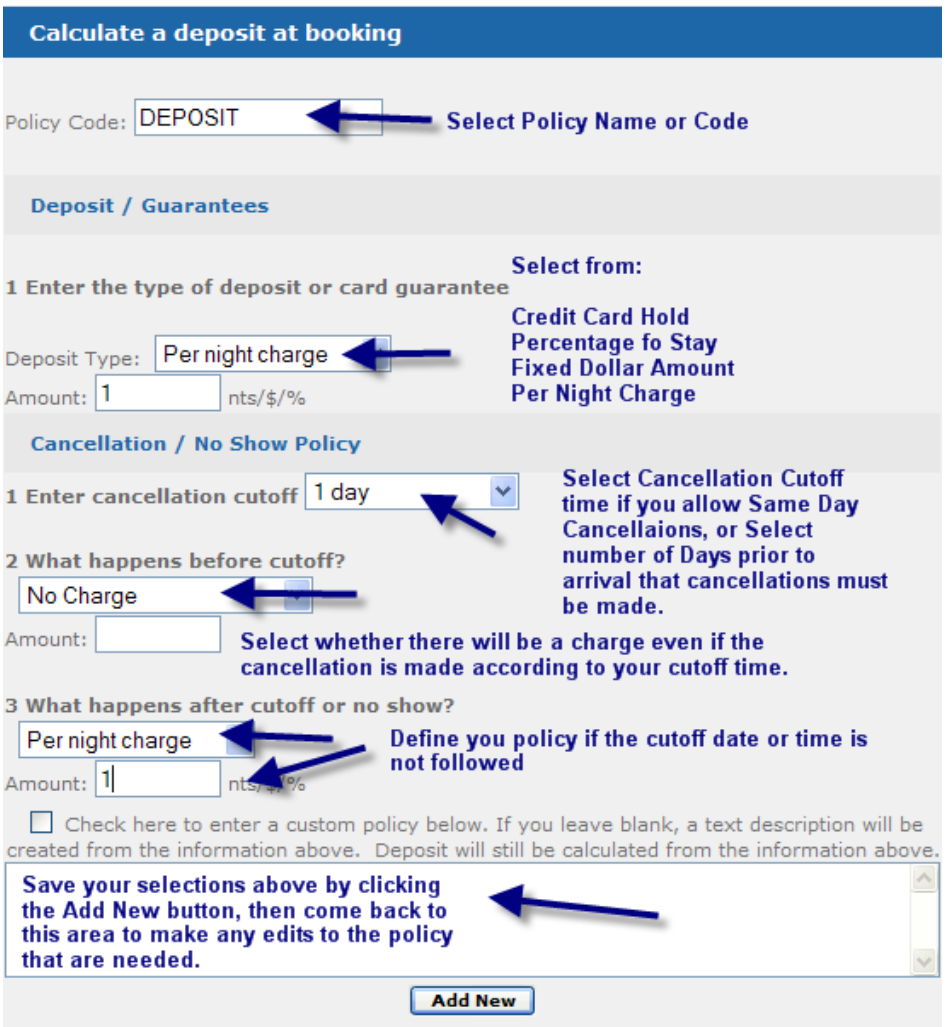
CREATING A SIMPLE POLICY WITH NO DEPOSIT REQUIRED

1. In **Edit Settings**, select **Cancellation Policies** from the **Reservation Terms** section. Select the **Add New Policy** button to add a policy.
2. Select the **Do Not Calculate a Deposit** option (one text field only). Click the Submit button.
3. Assign your Policy a Code or name – a limit of 10 characters applies. You can change the name of your policy at any time. If you have policies that have assigned numbers, it is easier to recognize which policy you are selecting if you give it a descriptive name.
4. Add your policy to the Policy Text field, then click the **update** button.

CREATING A POLICY THAT INCLUDES A DEPOSIT

1. In **Edit Settings**, select **Cancellation Policies** from the **Reservation Terms** section. Select the **Add New Policy** button to add a policy
2. Select **Calculate and display deposit information.** Custom text may still be used for display purposes.
3. Fill out the form to define your policy. See instructions in this example.

Helpful Hints! This tool will write your policy for you, and is a great way to avoid the issue of creating the correct wording for your policy. You may use this tool to allow the booking engine to write your policy for you even if you choose not to include a deposit.

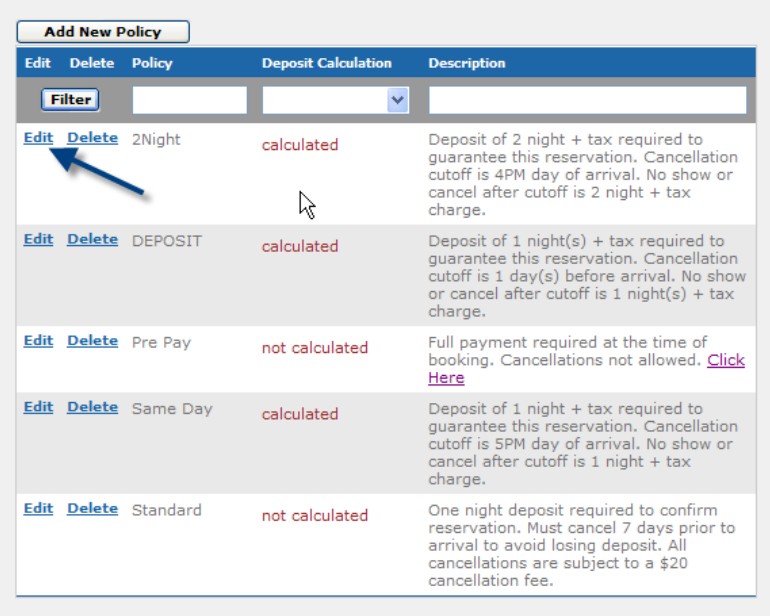

Calculate a deposit at booking
Policy Code: DEPOSIT
Select Policy Name or Code
Deposit / Guarantees
1 Enter the type of deposit or card guarantee
Select from:
Credit Card Hold
Percentage fo Stay
Fixed Dollar Amount
Per Night Charge
Deposit Type: Per night charge
Amount: 1 nts/$/%
Cancellation / No Show Policy
1 Enter cancellation cutoff 1 day
Select Cancellation Cutoff time if you allow Same Day Cancellaions, or Select number of Days prior to arrival that cancellations must be made.
2 What happens before cutoff?
No Charge
Amount:
Select whether there will be a charge even if the cancellation is made according to your cutoff time.
3 What happens after cutoff or no show?
Per night charge
Amount: 1
Define you policy if the cutoff date or time is not followed
Check here to enter a custom policy below. If you leave blank, a text description will be created from the information above. Deposit will still be calculated from the information above.
Save your selections above by clicking the Add New button, then come back to this area to make any edits to the policy that are needed.
Add New

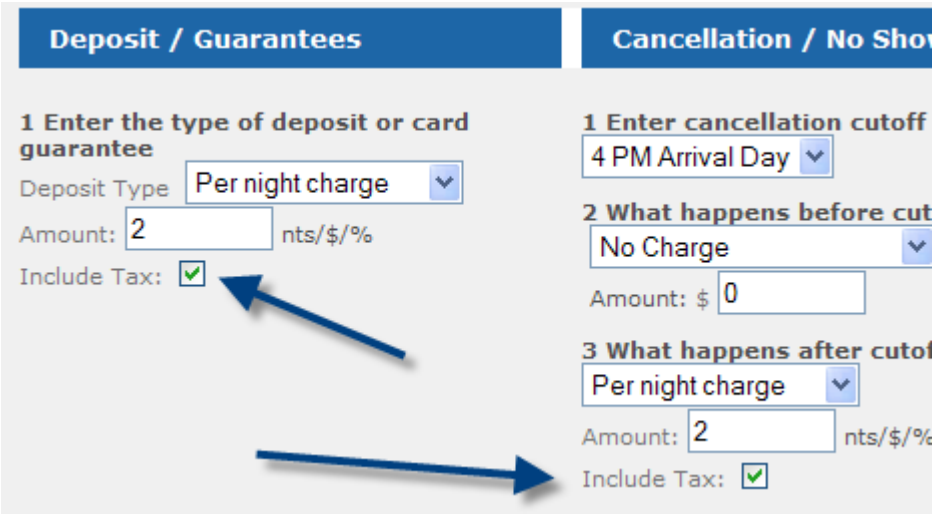
ADDING TAX TO YOUR DEPOSIT OR CANCELLATION / NO SHOW CHARGES

After creating your calculated policy, you can add taxes to your deposit or no show charges. To add taxes to these charges follow these steps.

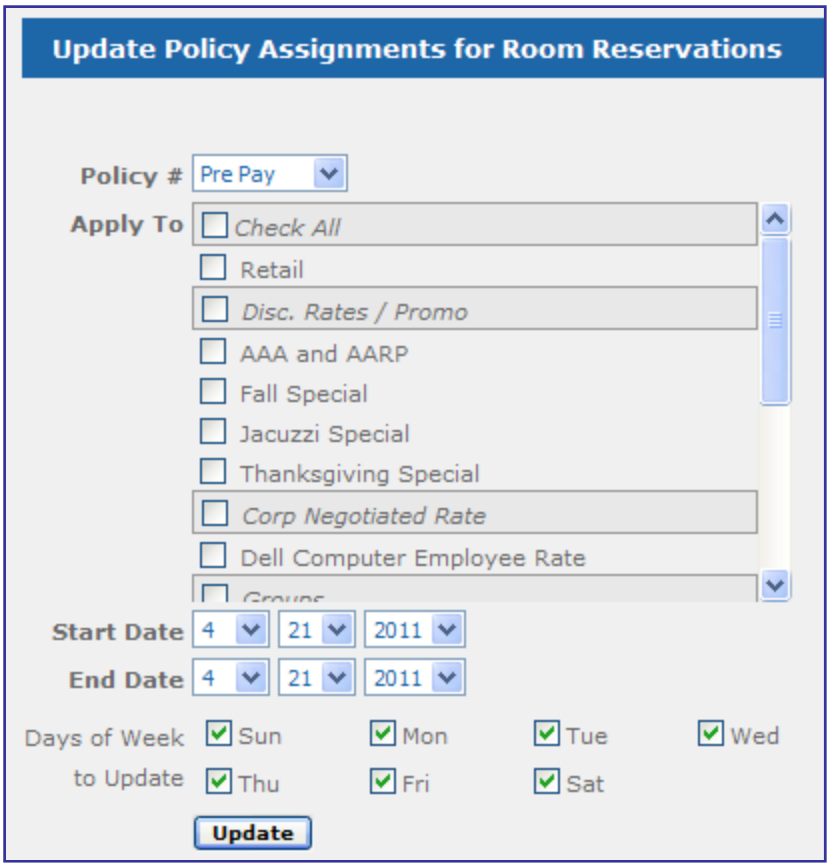
- Re-open the policy using the **Edit** link found on the **Cancellation Policies** page.
- Check the **Include Tax** check box under either the Deposit or Cancellation / No Show sections.

Checking these options will cause the booking engine to apply your **Room Tax** charges to your Deposits or Cancellations.


Add New Policy
Edit Delete Policy Deposit Calculation Description
Filter
Edit Delete 2Night calculated Deposit of 2 night + tax required to guarantee this reservation. Cancellation cutoff is 4PM day of arrival. No show or cancel after cutoff is 2 night + tax charge.
Edit Delete DEPOSIT calculated Deposit of 1 night(s) + tax required to guarantee this reservation. Cancellation cutoff is 1 day(s) before arrival. No show or cancel after cutoff is 1 night(s) + tax charge.
Edit Delete Pre Pay not calculated Full payment required at the time of booking. Cancellations not allowed. Click Here
Edit Delete Same Day calculated Deposit of 1 night + tax required to guarantee this reservation. Cancellation cutoff is 5PM day of arrival. No show or cancel after cutoff is 1 night + tax charge.
Edit Delete Standard not calculated One night deposit required to confirm reservation. Must cancel 7 days prior to arrival to avoid losing deposit. All cancellations are subject to a $20 cancellation fee.



After creating a policy, you must select which rates to apply it to in the **Update Policy Assignments for Room Reservations** section at the bottom of the page.



- **Select the Policy Name**
- **Apply the Policy to a Rate, Group, Promotion or Package – or All.**
- **Select a date range that the policy will be in effect.**
- **Select the days of the week that will apply to this policy.**

Helpful Hints! **IMPORTANT NOTE**

If you do not assign a policy to a rate, and add effective dates, the default cancellation policy that was set when you created the rate will be used.

Online Cancellations

You may choose whether or not to allow guests who book online to also cancel online. The Online Cancellations section of Reservation Terms offers the ability to turn this feature on or off by checking the **Allow online Cancellations** box.

Secondly, you will allow the option of allowing the booking engine to add back inventory into your available inventory for each reservation that is cancelled. This second check box can be selected to enable this feature.

Threshold: You may select a **threshold** to add back inventory only if a certain level of available inventory is available. This allows you control when inventory will be added back into availability. If you fall below that threshold no inventory will be added back.

Advanced Cancellation Time: You may set the number of days prior to arrival that cancellations will be enabled. You may choose **Same Day** and up to 30 days. If you select Same Day, you may set a cutoff time to stop taking Same Day reservations.

ADDITIONAL OPTIONS

Integration Links ■ **Language Translations** ■ ROI / Ad tracking

Integration Links

From time to time you might wish to distribute direct links to particular areas of your booking engine. The Integration links page makes it easy to find the links that you need. The integration links page shows links for the following areas.

- **Standard Booking Engine**
  - Retail IBE Engine
  - Reservations Modify (this is the cancellations link)
  - Travel Agent Entry (this is the login link for travel agents)
- **Packages** – each package will be listed separately so that you can use a link that goes to a specific package if desired.
- **Discount Rates/Promotions** – each promotion that you have created will appear with its own unique link, and can be used in banner ads, emails, Call to action banners or anywhere you want to link back to a promotion.
- **Corporate Negotiated Rate Logins** – this link goes directly to the login page for password protected corporate rates. If your also have the Group Reservation Module, a link for your Group Login will also be included.

Language Translations

The Secure-Res booking engine can enable the following language translations:

- German
- Spanish
- French
- Italian
- Japanese

To enable a new language to be used from a retail booking engine, you must add translations for the following fields:

- Disclaimer/Terms
- Room Names
- Room Descriptions
- Package Disclaimer/Terms
- Package Names
- Package Descriptions

Helpful Hints! **All translations must be loaded before enabling the language.**

The following fields are optional for translation:

- Package System Header
- Reservation Email Header
- Reservation Email Footer
- Prior To Arrival Courtesy Email Subject
- Prior To Arrival Courtesy Email Message
- After Departure Courtesy Email Subject
- After Departure Courtesy Email Message

ADDITIONAL OPTIONS

ENABLING LANGUAGE TRANSLATION FUNCTIONALITY

- On the **Customizations** page in the **Property** section of **Edit Settings**, you will find a **Language Translation Status** option. To enable the use of the translation pages you will need to first enable the Language Translation option by selecting the **On** option.
- Return to the **Language Translations** page under **Additional Options** in **Edit Settings**. At the bottom of the page, select the language that you wish to enable by clicking on the translation link. This will begin the translation process. You will be presented with fields showing all of the text that needs to be translated, with the English version in a shaded field, and an empty field below it to allow you to add the translation for the existing description.
- Add your translations for each field presented on the page. Each field will be labeled to identify where the area being translated is coming from. At the bottom of the page **Save** your work first, and then click the **Next** button to proceed to the next page of translations. You may **save** the page and not continue if you need to stop without finishing the translations. This will allow you to return to the page again and pick up where you left off.

On the last page of the translations there is a **Check to enable booking engine** check box. You must check this box to enable the booking engine translation. **Save** your changes on this page to complete the process.

SENDING YOUR TRANSLATIONS TO SOMEONE ELSE TO TRANSLATE

- If you are having a translation service or another person translating the booking engine fields for you, you can create a report of all of the text that will need translation by selecting the **Printable Version of English Translations** link. You can print this from your browser, or highlight and copy the information on the report page and paste into a document or email.

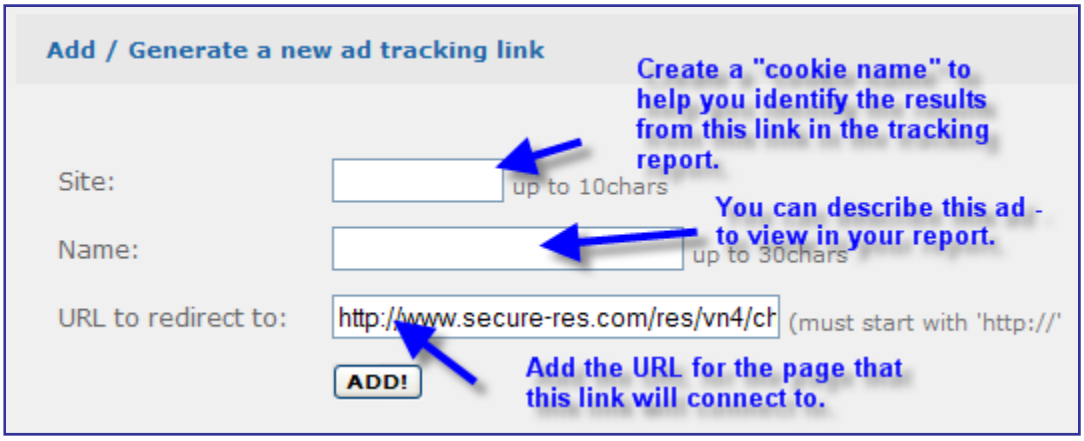
Commonly Asked Questions – The booking engine includes some pages with more information in our **Commonly Asked Questions** section of the **Language Translations** page. Please take a few moments to review these pages for more details and information about translating your booking engine.

ROI / Ad Tracking

The ROI Ad Tracking link allows you to ensure that you never have to advertise with other websites or send an email blast without knowing exactly how much revenue was earned for your efforts. The ROI/Ad Tracking tool allows you to create a link that will re-direct to your website, or booking engine that will track the reservations that were made by people who clicked on the link. It's easy and convenient to use, and you can create as many links as you will need.

In Additional Options, click on the ROI / Ad tracking link to open the tool.

- Select the "**Site**" name. This name will appear on your tracking report to help you identify the results for this link.
- In the **Name** field, describe this promotion. This is handy when you might have multiple links on one site.

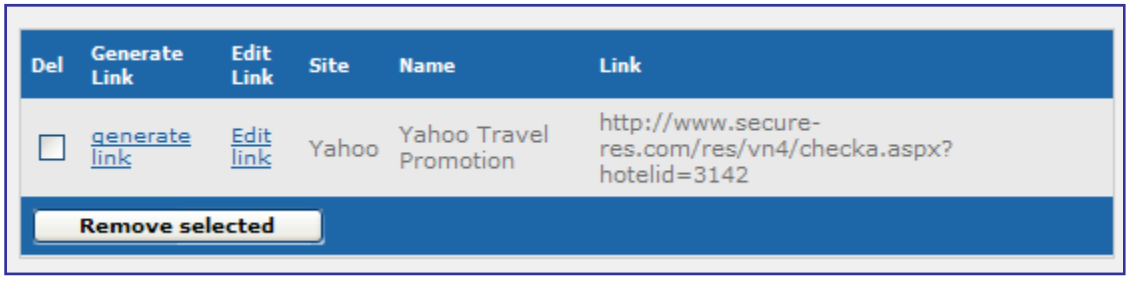

Add / Generate a new ad tracking link
Create a "cookie name" to help you identify the results from this link in the tracking report.
Site:
up to 10chars
You can describe this ad - to view in your report.
Name:
up to 30chars
URL to redirect to:
http://www.secure-res.com/res/vn4/ch
(must start with 'http://'
ADD!
Add the URL for the page that this link will connect to.

- Add the page link that you wish to have your visitors directed to. This could be a page on your website, or a direct link to your booking engine pages.

After you have added your information, click the **Add** button to create your tracking link. You will see your tracking link appear on the next screen. You can copy this link to use it wherever you wish to place a link to your website or booking engine pages.

Note: You must give this URL to advertisers as is below with no spaces.
http://www.secure-res.com/rdx.asp?goto=http%3A%2F%2Fwww%2Esecure%2Dres%2Ecom%2Fres%2Fvn4%2Fchecka%2Easpx%3Fhotelid%3D3142&orig=test

If you wish to come back later to get the link, just open the ROI / Ad Tracking page again. You will see your tracking links displayed at the top of the page. To see your link, click the **generate link**. To change the link attributes, click the **Edit link** to make changes. You may delete the tracking link by selecting the **DEL** box and clicking the **Remove selected** button.



You will be able to view the results of your tracking links in the **Report Review** section of your booking engine.

New Reservations

VIEWING YOUR RESERVATIONS

Once your reservation system is set up, you can manage and review all your online reservations. When logging into the Secure-Res booking engine, select the **Reservations Review** section to manage your reservations.

After logging in you will see your new reservations displayed with a brief summary of the reservation details. To open the reservation, click on the reference number to see the full details of the reservation. This will give you full access to guest contact information, daily rates, taxes, credit card number, extra items like additional fees, dynamic packaging items, guest comments, travel agent information (if booked by a travel agent), and rate type. Below is an example of your new reservation list.

New Reservations
No Status First Last Arrive Nts Rms Amount Date Site
4444360 Pending Mary Cosmo 5/17/2011 3 1 429.00 4/22/2011
4309095 Pending Suzanne Nygord 8/15/2011 3 1 252.00 2/10/2011 SEO
Submit

MANAGING YOUR RESERVATIONS

Managing your Reservations is simple and with a very few steps you can keep your new reservation queue current and easy to manage. When you arrive at the New Reservations section you will see reservations that have not been processed.

To view a reservation:

1. Click on the Reservation number on the left. This will open the full reservation for viewing
2. When viewing the full reservation page, you may print a copy to have a hardcopy to use for reference, or for copying into your property PMS system.

To Process a reservation:

Helpful Hints! After viewing and/or printing your new reservation, it is important that you select the check box next to the reservation and click the **Submit** button to process the reservation. This will move it out of the **New Reservation** queue. This will ensure that every time you come into the **Reservation Review** page you will see only your new reservations. The benefit of keeping this area clear of old reservations is that you can quickly identify new reservations and avoid possibly missing one because it was buried in a big list.

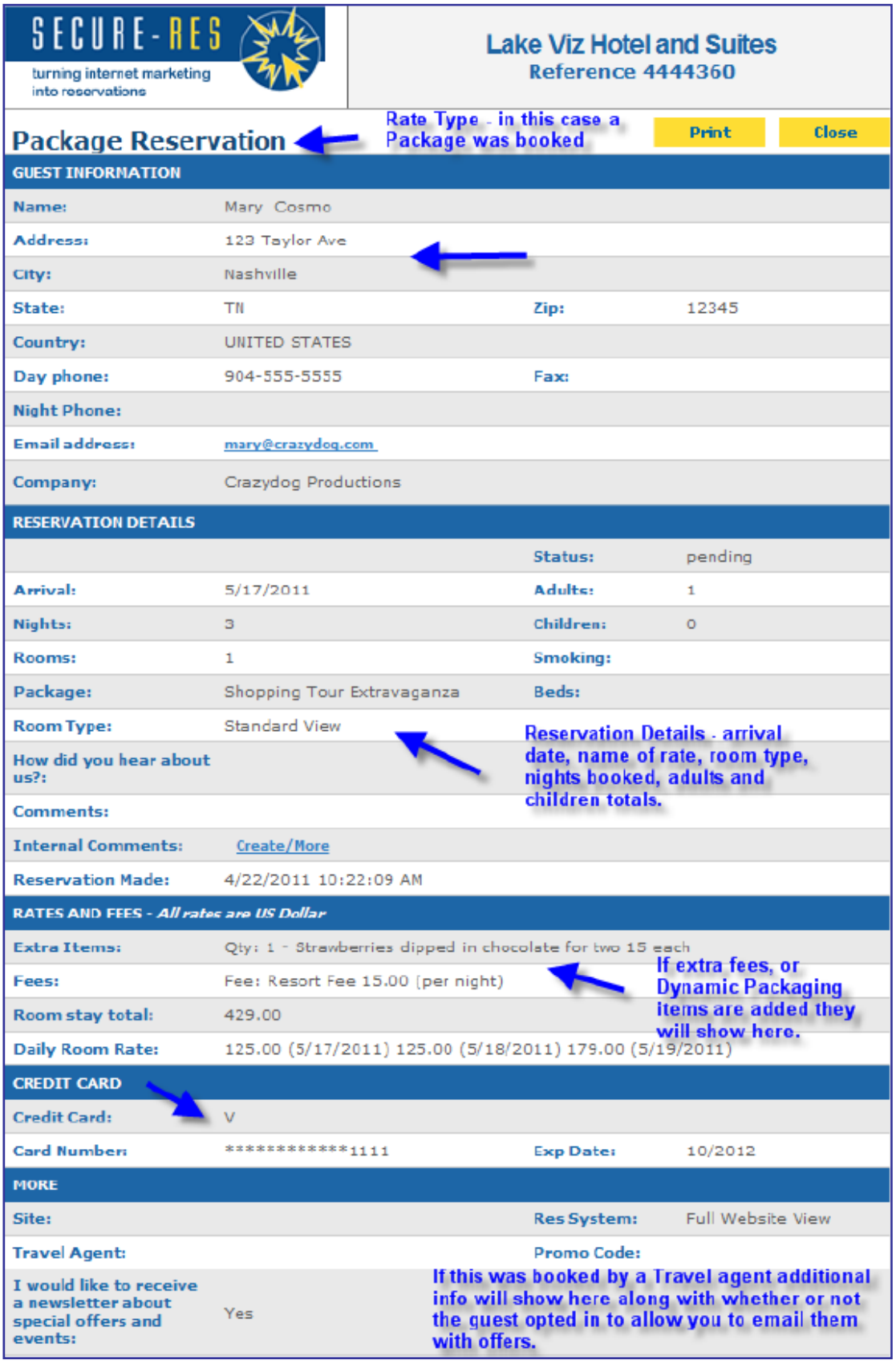
Search Reservations

On the left hand search tool on the **Reservations Review** page you can search by New, Date Placed, or Arrival Date. You may also search by guests Last Name, Reference Number or Group Name (if you use the Groups Module).

To the right is a screen shot of a reservation that was opened using the reference number link.

You can see that all of the reservation details are available to you.

NOTE: This screen shot does not show the full credit card number, however you will be able to see the full number until 30 days after the guest departs. After that the number will be hidden, so it is important that you capture that information before that time.


SECURE-RES
turning internet marketing into reservations
Lake Viz Hotel and Suites
Reference 4444360
Package Reservation
Rate Type - in this case a Package was booked
Print
Close
GUEST INFORMATION
Name: Mary Cosmo
Address: 123 Taylor Ave
City: Nashville
State: TN
Zip: 12345
Country: UNITED STATES
Day phone: 904-555-5555
Fax:
Night Phone:
Email address: mary@crazydog.com
Company: Crazydog Productions
RESERVATION DETAILS
Status: pending
Arrival: 5/17/2011
Adults: 1
Nights: 3
Children: 0
Rooms: 1
Smoking:
Package: Shopping Tour Extravaganza
Beds:
Room Type: Standard View
How did you hear about us?:
Comments:
Internal Comments: Create/More
Reservation Made: 4/22/2011 10:22:09 AM
Reservation Details - arrival date, name of rate, room type, nights booked, adults and children totals.
RATES AND FEES - All rates are US Dollar
Extra Items: Qty: 1 - Strawberries dipped in chocolate for two 15 each
Fees: Fee: Resort Fee 15.00 (per night)
Room stay total: 429.00
Daily Room Rate: 125.00 (5/17/2011) 125.00 (5/18/2011) 179.00 (5/19/2011)
If extra fees, or Dynamic Packaging items are added they will show here.
CREDIT CARD
Credit Card: V
Card Number: **********1111
Exp Date: 10/2012
MORE
Site:
Res System: Full Website View
Travel Agent:
Promo Code:
I would like to receive a newsletter about special offers and events: Yes
If this was booked by a Travel agent additional info will show here along with whether or not the guest opted in to allow you to email them with offers.

Cancelling a Reservation

The Secure-Res booking engine has both a flat monthly fee version, and a transactional fee version. If you have the **Secure-Res Transactional booking engine** you will be charged per reservation rather than a flat rate fee. You will want to be able to cancel reservations in the booking engine to avoid being charged for a guest that cancels with the hotel rather than online, or if a guest does not show. The steps below detail how to accomplish a cancelled reservation. During the cancellation process, you will have the option to cancel the pre and post stay emails so that the guest no longer will receive these automated emails, however if the reservation status is Cancelled, the courtesy emails will not be sent.

1. Log into Vizergy Client Login to access your **Secure-Res Booking Engine**.
2. Once inside Vizergy Client Login, select the "**Reservations**" button and click on **SECURE-RES Website Reservation System.**
3. After logging into the Secure-Res Booking Engine, click on the **Reservations Review** link.
4. If the reservation is not showing in the **New Reservations** page, you may search for the reservation using the search tool on the left. Once the reservation is located, click on the **reservation number** to open the reservation details.
5. On the top-right hand corner of the **Reservation Details**, click on the "**Options**" button.
6. You will have the option to cancel the reservation by selecting the "**Cancel Reservation**" button. You may cancel reservations up to, and including, the date of arrival.
7. Once cancelled, the guest and Reservations Delivery contact(s) will receive the standard cancellation email* from the booking engine and the cancellation number and time/date cancelled will appear within the Reservation Details. The status of the Reservation will also be changed to "Cancel".
8. To spot the difference between a guest-cancelled reservation vs. a property-cancelled reservation, the reservation cancelled by the property will not have information in the field labeled "Cancel Reason".
9. **You may also de-select the Pre-Stay and Post-Stay emails at the time of cancellation, so that the guest will not receive these automated emails.**

You may cancel the Pre and Post Stay emails for both flat fee and transactional Secure- Res booking engines.

Setting Rates ■ View/Print Rates / Inventory / Minimum Length of Stay ■ Edit Current Data ■ Edit by Room Type without Seeing Current Data ■ Setting Package Rates

Setting Rates

The **Rate Administrator** section is where all of your rates are stored and managed. Your retail rate page will be shown by default. If you have other rates, like **Package Rates**, **Group Rates**, **Corporate Rates**, or other **Rate Tiers** you will need to select the rate that you want to work with before proceeding. If you do not have any additional booking engine modules added to your booking engine, you will only have a **Retail Rate** and no additional selection is necessary.

If applicable, select the rate that you wish to edit from the left navigation bar. Once the rate is selected, verify that you are seeing the correct rate on the gold Rate Administrator header area. This helps to ensure that your correct rate is selected.

The three sections on this page allow you to:

- **Run a report** to view your rates, inventory, and minimum stay settings (**View/Print Rates / Inventory/Minimum Length of Stay**) – located at the top of the page.
- **Edit** a short time frame for Rate, Inventory, or Minimum Length of Stay (MLOS) (**Edit Current Data**)
- **Set your rates** and seasons, or apply blackouts to all of your rooms at one time. (**Edit by room type without seeing current data**)

View/Print Rates / Inventory / Minimum Length of Stay

This report located at the top of the Rate Administrator page allows you to view the Rates, Inventory and MLOS that have been entered. This is a very useful feature that allows you to check your work, or verify where your last season's dates left off.

Below is an example of a report that was run for the following dates. It shows Rate, Availability (Inventory), and Minimum Length of Stay for each of the room types associated with this rate. NOTE: It is not necessary to set a MLOS for one night. One night is assumed.

Date	Standard View			Jacuzzi Suite			Honeymoon Suite		
	Rate	Avail	MLOS	Rate	Avail	MLOS	Rate	Avail	MLOS
4/22/2011 - Fri	179	25	0	259	5	2	255	10	0
4/23/2011 - Sat	179	25	0	259	5	2	255	10	0
4/24/2011 - Sun	179	25	0	259	5	2	255	10	0
4/25/2011 - Mon	179	25	0	259	3	2	255	10	0
4/26/2011 - Tue	179	25	0	259	3	2	255	10	0
4/27/2011 - Wed	179	25	0	259	3	2	255	10	0
4/28/2011 - Thu	179	25	0	259	3	2	255	10	0
4/29/2011 - Fri	179	25	0	259	5	2	255	10	0
4/30/2011 - Sat	179	25	0	259	5	2	255	10	0

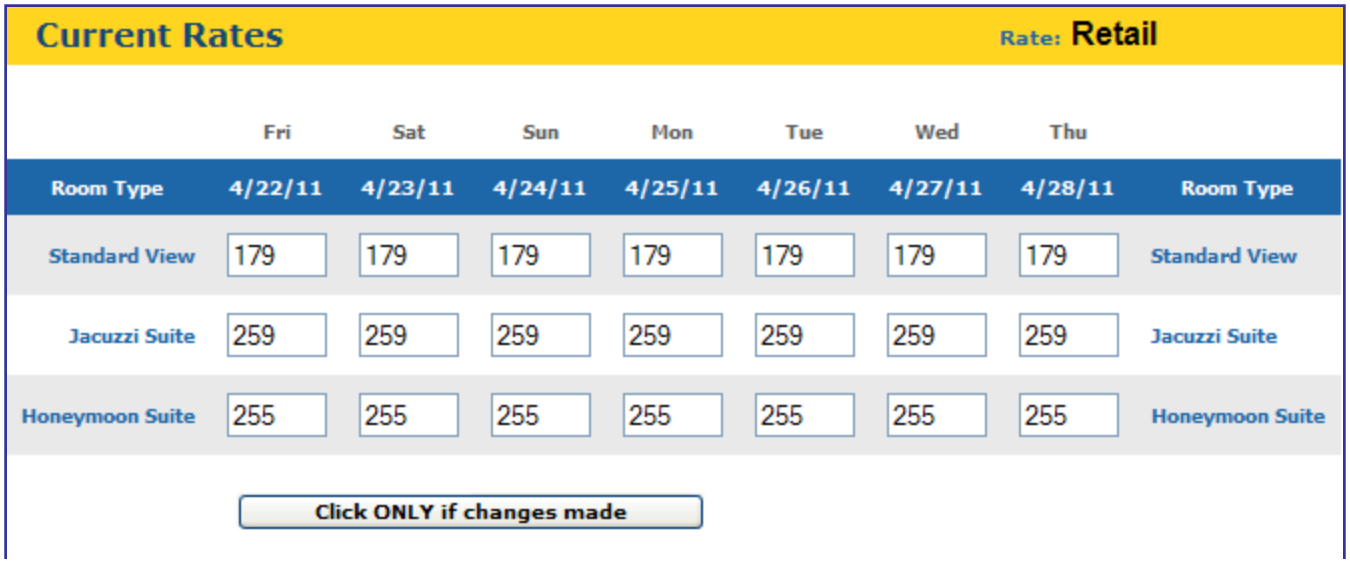
Edit Current Data

The Edit Current Data tool allows you to make edits to existing rates, inventory, or MLOS. This tool was intended to allow you to make small changes to existing data. It is not however the most efficient way to enter rates and inventory initially, as it requires an edit for every day, for every room type.

Helpful Hints!

Using this method to enter multiple rates or close out large segments of dates does have the potential to miss a date which could result in an unwanted reservation. This tool is best used for small changes only.

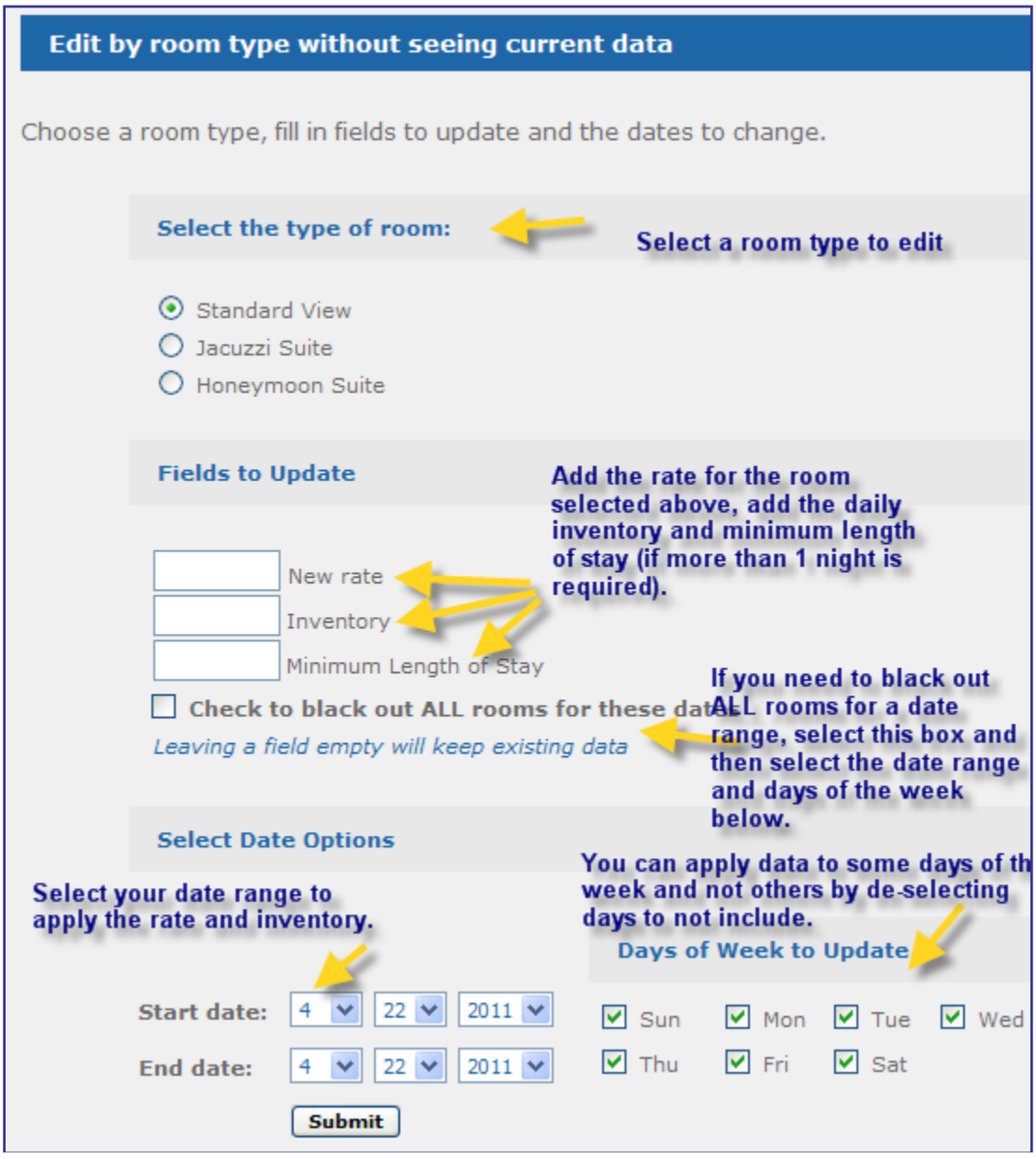
1. To begin editing your current data, select the type of data that you wish to edit, from the Rate, Inventory, or Minimum Length of stay options.
2. Enter the dates that you wish to edit data.
3. Edit the data directly in each day and each room type that needs editing. If you are editing inventory, adding a zero will close out the room for the date you edit.



4. Click to save your changes. **Be sure to check your work using the View/Print Rates tool.**

Edit by Room Type without Seeing Current Data

This section of **Rate Administrator** is located at the bottom portion of the page. It is the tool that you will use to set all of your rates. **For Retail Rates, Rate Tiers, and Group Rates** the process is identical. See the image below for details.


Edit by room type without seeing current data
Choose a room type, fill in fields to update and the dates to change.
Select the type of room:
Select a room type to edit
Standard View
Jacuzzi Suite
Honeymoon Suite
Fields to Update
Add the rate for the room selected above, add the daily inventory and minimum length of stay (if more than 1 night is required).
New rate
Inventory
Minimum Length of Stay
Check to black out ALL rooms for these dates
Leaving a field empty will keep existing data
If you need to black out ALL rooms for a date range, select this box and then select the date range and days of the week below.
Select Date Options
You can apply data to some days of th week and not others by de-selecting days to not include.
Select your date range to apply the rate and inventory.
Days of Week to Update
Start date: 4 22 2011
End date: 4 22 2011
Sun Mon Tue Wed
Thu Fri Sat
Submit

Helpful Hints! If your weekday rates are different than your weekend rates, you would enter your weekday rates, de-select the weekend days from the Days of the Week Update, add your date range and submit. Come back to enter your weekend rates, de-select your weekday rates and enter the same date range. This will give you weekend and weekday rates for the same date range.

Setting Package Rates

Setting Package rates are only slightly different than entering other rates. The only difference is that you are not setting inventory or minimum night stay data. You are only setting rates. For **Packages** your inventory will always pull from your available retail inventory. So if there is available inventory in your retail rates it will be available to book a Package also. This will make it easy to close out Retail rates as well as packages by closing out your Retail rates.

Your minimum night stay is set when you create your Package and specify a package length. This leaves only your rates that need to be set.

PACKAGE RATES vs. DAILY RATES

When you created your Package; you had an option to select **Use Daily Rates**. If you selected this option the rate you would be entering would be the rate that applies to each day of the stay for the entire Package length. If you did not select Use Daily Rates, then the rate you enter is the rate for the Package length. The rate that applies on the day of arrival will be used for the Package rate.

A Package Using Daily Rates with a Package Length of 2 nights – the rate you add will be charged for each of the 2 days.

Example: Golf Package with Daily Rates for two nights $225. + $225. = $450. for the two night stay.

A Package Using Package Rates the rate you added would be charged once for the two day stay.

Example: Golf Package using Package Price for a two nights package would be charged $225 for entire stay.

Extra Nights: If your Package allows extra nights, your guest could stay past the Package Length, however the Extra Nights would be charged the **Retail** rate. This will apply to both daily and package rate structures.

Example: Golf Package using Package Price for a two night package would be charged $225 for the package length, plus the retail rate of $145 per night for the remainder of the stay.

-OR-

Example: Golf Package using Daily Rates for two nights would be charged $225. + $225. = $450, plus $145 per night for the remainder of the stay.

CLOSING OUT YOUR PACKAGE RATES

You already know that closing out your Retail Rates will close out your Packages also. However, there will be times when you only want to close out your Package. This is easily done by adding a zero price “0” for your package. Without a price your package is not available. Simply change your price for each room type in the package that you wish to close out to zero, set the date range and your package is closed. As always, check your work in the **View /Print** tool at the top of the page.

REPORTS REVIEW

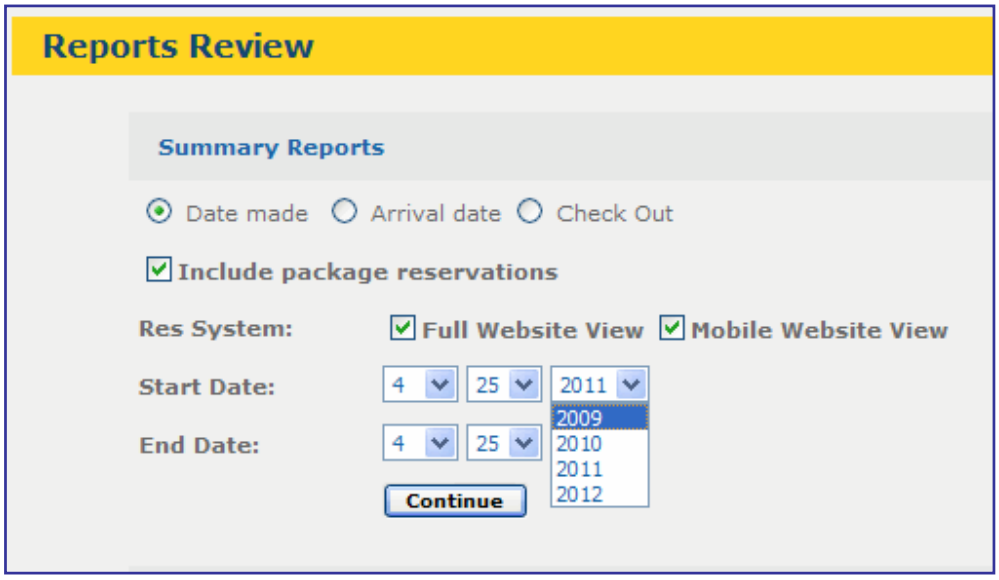
Summary Reports ■ **Summary Package Reports** ■ Retrieve Emails ■ Ad Tracking ■ Look to Book ■ Dynamic Packaging ■ Custom Report Generator ■ Travel Agent ■ Schedule Reports ■ Denials Report

When you select the Reports Review navigation link you will see a page with 2 or 3 reports showing. If you do not have the Package Module added to your booking engine, you will see the Summary Report and the Retrieve Emails report. If you have the Package Module, you will also see a Summary Package Report also.

Summary Reports

Your Summary Report allows you to create a reservation and revenue report of all reservations during a time frame. You can run the report for the previous two years, and for one year in the future. You may configure the report to run by **Date Made**, **Arrival Date** or **Check Out** date, depending on the kind of data you are looking for. If you have a mobile site, you can also choose reservations from your Mobile Website, or your Full Website, or both.

If you have the Package Module you can include Package reservations in this report, or you may run a separate report for packages by using the Package Summary Report.



The Summary report will show the number of reservations, room nights and total revenue, along with the number of cancelled reservations.

Monthly Reservations by Date Placed

Month	Gross Reservations	Gross Room Nights	Gross Sales	Net Reservations	Net Room Nights	Net Sales
8-2010 Canceled	1 0	4 0	$525.00 $0.00	1	4	$525.00
10-2010 Canceled	3 0	6 0	$1,155.00 $0.00	3	6	$1,155.00
1-2011 Canceled	1 0	4 0	$716.00 $0.00	1	4	$716.00
2-2011 Canceled	1 0	3 0	$252.00 $0.00	1	3	$252.00
4-2011 Canceled	1 0	3 0	$429.00 $0.00	1	3	$429.00
Total Canceled Total	**7** 0	**20** 0	**$3,077.00** $0.00	**7**	**20**	**$3,077.00**

Retrieve Emails

The **Retrieve Emails Report** allows you to access all of the emails that have been submitted for reservations. The guest's email address will show along with the date that it was provided. You will also see a field for **Type**. If the email address came in through a reservation the type will display as **Res**. If the email came in through the Email Harvesting tool the type will show as **Req**.

It is important to note that there is an Opt In field, for guests to specify whether or not they choose to receive emails from you or not. It is important that you only send emails to guests who select "Yes" in the Opt In option.

Ad Tracking Report

If you setup an Ad Tracking link in the Secure-Res Booking Engine, you will be able to access the Ad Tracking Report to view the results of your link.

From 4/25/2009 to 4/25/2011

Site	Name	#Reservations	Room/Nights	Amount
CHCIRL		2	4	750.00
EM1210		1	4	716.00
LMLCVB		1	2	405.00
SEO		2	7	777.00

You will see the cookie or **Site**, **Name**, **#Reservations**, **Room/Nights**, and Revenue **Amount**. The example above does not show a **Name** description, as it is not required; however it is recommended that you describe your Ad for reporting purposes.

While this is a great way to identify reservations and revenue coming in when someone clicks this link, it also has an additional benefit of identifying other Ad Tracking links that are setup by your competitors. The reason for this is that any Secure-Res Booking Engine will identify and report on any Secure-Res Ad Tracking links. So when your competitors who might also be using the Secure-Res Ad Tracking link sets up a link, potential guests who click on it will have the tracking cookie implanted on their computer. When they look at your competitors booking page but decide to instead book a reservation with your hotel instead, the tracking link is recorded on your booking engine. So if you see a tracking site name that is not one that you setup, it is one that was setup by one of your competitors and you essentially took that reservation instead.

So smile when you see them – it means that you are more attractive to guests looking at hotels in your area!

Look to Book Report

The Look to Book Report counts visits to your booking engine, number of rate searches, No Availability results, Reservations, and Unique Visits to Reservations Ratio.

- **Unique Visits -** This number reflects the number of visitors who came to your booking engine pages during the timeframe you are reporting on. A Unique Visit is one visit per half hour. So if a guest comes back within a half hour after leaving, it will not be counted again. However if they return later after the half hour cutoff, they will be counted again as a Unique Visit.

- **Rate Searches** - This number shows how many rate searches were performed during the time frame that you have selected. Most visitors perform more than one rate search and the rough rule of thumb is two rate searches per visitor, so this number will be generally twice as big as the Unique Visits number. In this example it is a bit less than twice, and you will see some variance to this rule.

Data for the period 4/25/2009 to 4/25/2011

Unique Visits **	47911
# Rate Searches	78018
No Availability Results	3856
Reservations	4104
Unique Visits to Reservations Ratio	8.57 %

** Unique visitors who performed a rate search

- **No Availability Results –** This number is always a concern to hotels and can be a bit confusing, especially if you know you always had rooms available during the period you are reporting on.

  In order to qualify as a No Availability Result, there must be no rooms available that match **exactly** the search that the guest put into the booking engine.

Below are some reasons that will cause a No Availability Result, even though rooms and rates are available in the booking engine.

- **Occupancy Rules** - Guests are requesting a room for more people than your room occupancy rules allow.

- **Consecutive Day Availability** - Guests are requesting a date range that no single room has continuous availability for. For example, if during a two week period there are always rooms available but no single room is available for 14 days in a row, and the guests puts in a search for 14 days, no availability will be displayed because a single room must be available for the full stay. Even though other rooms would overlap, a reservation cannot be booked that would require the guest to move to another room during their stay.

- **No Arrival Restriction** – If you have configured a **No Arrival** for the first day of the guests intended stay, then a No Availability Result will display because they are looking for a stay that begins on a day that you have set as a No Arrival date.

- **Advance Reservation Restriction** – If you have an Advance Reservation Restriction that does not match the guest's request, a No Availability Result will occur. So if for example you have a 2 day lead time set on your booking engine, and the guest wants to book a reservation for tomorrow, the booking engine will not allow them to book before your lead time requirement and a No Availability Result will occur.

- **Advance Searches** – If searches are done for a date that is well in the future, you may not have entered availability for some dates yet. This will cause a No Availability Result, even though you may have availability later when you add your rates and inventory.

Keep in mind that an Exact Match for the search is required in order for rooms to be offered in the results page.

Dynamic Packaging Report

If you have added the **Dynamic Packaging Module** to your booking engine you will be able to run this report to track sales and revenue from your Dynamic Packaging items.

You may Search by Date Placed or Arrival Date, and select either a Summary or Detailed Report. Below is an example of a Detailed Report by Arrival Date.

From 4/25/2008 To 4/25/2011

No.	Qty	Product	Arrival	Item Date	Total	Status
2635430	3	Dolphin Games Shuttle	12/13/2008	12/13/2008	45.00	
2637554	2	Chocolate Covered Strawberries	9/6/2008	9/6/2008	30.00	
2648937	2	Champagne Breakfast for Two	11/22/2008	11/22/2008	50.00	

Each order in the **Detailed Report** includes the reservation number, the arrival date as well as the date the item is to be offered.

A **Summary Report** will total all similar items into a single line item, rather than by each order separately, and will not include the reservation number, or guest arrival dates.

Custom Report Generator

The Custom Report Generator allows you to select the fields that you wish to include in your own custom report. This report is completely custom in nature and allows you to build a report that includes only the data that you need. Select a field from the 5 categories to setup your custom report.

- **Customer Information**
- **Reservation Information**
- **Rate Information**
- **Tracking Information**
- **View Report by Dates**

Be sure to select all of the information that you need. A maximum time frame of one year can be entered. The report will open on your screen when you submit your desired report. You will be able to print your report or you will have the option to open your report in Excel if desired.

Travel Agent Reports

If you have opted to allow Travel Agents to book reservations on your booking engine you will see a **Travel Agent Report**. This report allows you to view reservations during the previous 3 months that were made by travel agents, based on guest check-out date.

You will see the Agency Name, address, IATA#, phone number, fax number, email address and contact name.

Below is an example of a reservation made by a travel agent, and reported in the Travel Agent Report.

Agent: Harmon Travel
1529 W. Washington
Boise, Id 83702
United States

IATA# 13684985
PH: 208-388-3000
FAX: 208-388-3003
Email: maryellenc@harmontravel.com
Contact: Bob Harmon

Ref	First Name	Last Name	Status	Room	Check In	Nights	Total	Comm. Total
4298969	Dawn	Iwakiri	Consumed	Elvis '56 Package	3/4/2011	2	$ 1,080.00	$ 1,080.00
						Total	$ 1,080.00	$ 1,080.00

Helpful Hints!

You will only be able to pull up a report for the previous 3 months. You will not be able to see a report for the current month. Be sure to run this report monthly to allow you to pay out any commissions applicable to travel agents who placed a reservation during the previous month.

Schedule Reports

Schedule Reports allows you to setup reports that are automatically delivered via email according to a schedule that you specify. These reports are designed to keep you informed on the status of your generated revenue as well as your inventory remaining statistics, so that you don't miss reservations due to your inventory running low.

The following reports are available to be delivered automatically to any email address that you specify.

- Year to Date Summary Reservations by Date Placed
- Year to Date Consumption by check-out date
- Previous Month reservation by Date Placed.
- Previous Month Consumption by Check–out Date
- Group Leads Past 30 days
- Inventory Remaining (30, 60 or 90 days)
- Inventory with Rates (30, 60 or 90 days)

Each of these reports can be delivered via a PDF document, or as an html document. You will find that the PDF document is best for printing, or emailing.

Helpful Hints! To View PDF versions of reports you will need to download Adobe PDF reader.
To View graphs in HTML versions of revenue reports, Adobe SVG Viewer is required if you do not already have them installed

SETTING UP A SCHEDULE REPORT

If you have scheduled reports already, you will see them listed when you first click on the **Schedule Report** navigation link. To add a report, select the Add a Report button to access the page where you can configure your report. The process will be the same as described in the steps below.

If you do not have reports already configured, you will see a page with a list of available reports. To configure a new report, the following steps are needed.

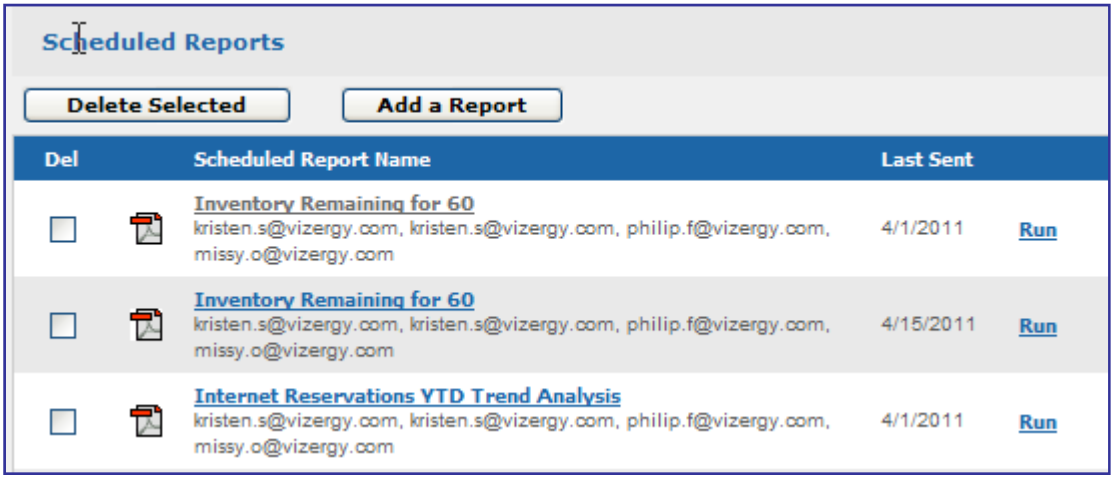
1. **Select the report** you wish to schedule
2. **Select the Report Format** (PDF or HTML)
3. **Select an email address** to send the report to. If the email address you wish to use is not displayed, select the Add new email address link to add a new address.
4. **Schedule your report** by selecting the **Monthly or Weekly** Option.

    - **The Monthly Option** will allow you to select the day of the month to run the report.
    - **The Weekly Option** will allow you to select the day of the week to run the report.

5. **Select a Delivery Method**. The **Send HTML** Now button will send the report to the selected email address now. The **Screen Only HTML** button will display the report on screen but not send it via email. The **Schedule** button will setup the report to be delivered according to the time frame you selected.

MANAGING YOUR SCHEDULE REPORTS

To manage your Scheduled Reports that have already been setup, navigate to your **Schedule Reports** page in **Reports Review.** You will see a list of reports that are scheduled.



You may Delete, Edit, or Run a specific report.

- **To delete**, check the box on the left, and click the Delete Selected button.
- **To Edit** the details of the report, click on the name of the report to open the editing page.
- **To run** the report click on the Run link on the right

Denials Report

The Denials Report is a day by day breakdown of the reservation searches that resulted in a No Availability and is based on the check-in date. This is an extension of your **Look/Book Report** discussed earlier. The same reasons that would cause a No Availability Results would apply to your Denials Report. See the **Look to Book** section of this chapter for a description of No Availability causes.

The Denials Report breaks the data down into a daily report, with the data for each day, plus the added field of Potential for Lost Room Nights. It is important to remember that if guests are requesting something that cannot be offered it will result in a Denial. If you had rooms and rates for each of the dates listed, the reason would be one or more of the reasons listed in the above **Look to Book** section.

Check In Date		Denials	%Denials	Potential Lost Room Nights	Searches	Searchers
3/25/2011	Friday	29	13.18%	35	220	72
3/26/2011	Saturday	39	19.31%	91	202	62
3/27/2011	Sunday	22	14.86%	22	148	27
3/28/2011	Monday	24	15.09%	43	159	32

Helpful Hints!
This data is cumulative, and will include ALL searches for each date, even if they were made many months in advance, possibly before your rates were updated.